

ALASKA VISITOR STATISTICS PROGRAM



ALASKA VISITOR EXPENDITURES SUMMER 1993

Department of Commerce & Economic Development
Alaska Division of Tourism
State of Alaska



IGNEAU • KETCHIKAN

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Introduction

Introduction

The *Alaska Visitor Statistics Program* (AVSP) was launched by the State of Alaska Division of Tourism in 1985. This ground-breaking visitor industry research program has been recognized as one of the most sophisticated among the 50 states. The McDowell Group of Juneau and Ketchikan, Alaska was selected by the Division of Tourism to conduct the 1993-94 study. This firm was also the program contractor in 1989-90 and in 1985-86.

Tourism continues to be an industry of growing importance to the state. Once regarded as a stepchild of the major traditional resource industries, tourism's tremendous growth in the past 10 years has given it legitimacy as a major industry. The AVSP, now in its third incarnation, is a critical link in understanding the Alaska tourism market. This program provides detailed information about visitors to the state so that government and industry can channel their marketing and development efforts in the most productive fashion.

The AVSP program consists of sampling arriving visitors for the period of one year by personal intercept interview, an expenditure diary survey, and a follow-up mail survey. The methodology developed by the McDowell Group has consistently yielded national records in response rates for visitor survey research; 97% for the personal intercept survey, 62% for the diary and 68% for the comprehensive mail survey for Summer 1993. These response levels are similar to previous years.

The program has four distinct but interdependent phases. These are the *Arrival Count*, *Random Arrival Survey*, *Visitor Expenditure Survey*, and *Visitor Opinion Survey*. The exhibit and map on the following pages show the survey locations and program phases.

A series of six comprehensive reports result from these surveys. This report, *Alaska Visitor Expenditures Summer 1993*, is the second in the AVSP III series.

Scope of Study

The *Alaska Visitor Expenditures Study* is a complete study of consumer expenditure patterns within Alaska by visitors. The primary objective of this study is to provide detailed expenditure information on visitor spending within the State, concentrating specifically on instate expenditure patterns. Related out-of-state expenditures such as transportation to and from Alaska and prepaid package tour purchases are quantified in total but not in detail (see Chapter IV). While these results are useful to approximate total spending, the premium value of this research is an understanding of the patterns of nonresident consumer spending by visitor type, category of expenditure, region and community.

Industry spending, as opposed to consumer spending, is not part of an expenditures diary study.

Coverage of Daily Diary Methodology

While the diary methodology is by far the most accurate method of gathering information on visitor consumer expenditure patterns, there is the limitation of omissions. Omissions occur in diary methodology. Respondents, though thorough and conscientious (especially given the cash incentive) do not always catch all expenditures. This is the primary reason why the expenditure totals in this report are considered the minimum actually spent. Due to the apparent completeness of the diary responses, omissions are not expected to be a large number.

Transportation to and from Alaska

Transportation to and from Alaska is not included due to the technical difficulty of determining from diary responses what portion of an air, cruise, non-Alaska ferry or motorcoach fare should be allocated to Alaska, Canada, U.S. and overseas locations involved in the out-of-state travel activity.

Industry spending

Industry spending (wages, operations costs, capital investment, etc.) in Alaska is, of course, not part of a consumer expenditure diary study. Some portion of the total dollars received from consumers by instate and out-of-state firms is converted into industry expenditures and investment which also benefits the economy. A complete analysis of the total impact of the visitor industry has been conducted by the Alaska Division of Tourism. A report entitled, *Alaska's Visitor Industry: An Economic Profile* is available from that agency.

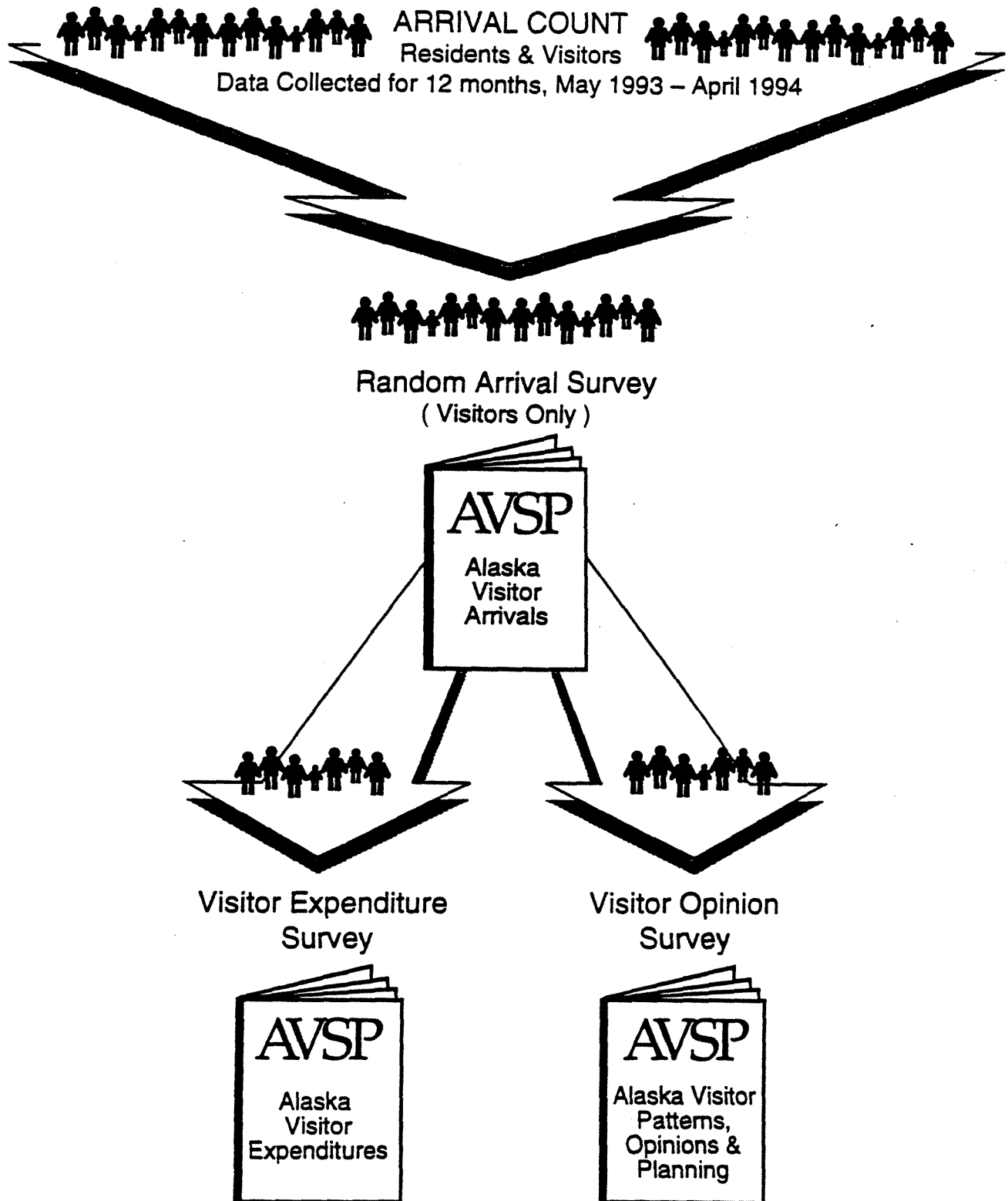
Alaska Visitor Statistics Program III Phases

Phase	Description	Purpose
1. Arrival Count (AC)	Secondary research collection of data on all passengers arriving in Alaska at their first points of entry.	To quantify the number of visitors and residents entering the state by each mode, using ratios found in the RAS phase, below.
2. Random Arrival Survey (RAS)	Personal intercept interviews with a scientific sample of visitors at their first point of entry.	To determine composition of visitors including their trip purpose, modes of entry/exit, origin, age, party size, gender, and travel type. To measure resident/visitor ratios for each entry mode for expansion to Arrival Count data. To collect names and addresses for VOS mail out survey. To administer VES diary to arriving visitors.
3. Visitor Expenditure Survey (VES)	29-day expenditure diary booklet distributed on arrival to every other RAS respondent.	To provide visitor expenditure data by detailed category and by region and community.
4. Visitor Opinion Survey (VOS)	20-page survey booklet with personalized cover letter from DOT Director mailed to every other RAS respondent (the half not getting a diary) after their return home.	To assess visitor use of, and satisfaction with, statewide and regional facilities, accommodations, attractions, transport modes and activities. To determine visitor volume by community, region and attraction. To collect trip characteristics data. To collect data on the Alaska trip planning process, travel habits and demographics.

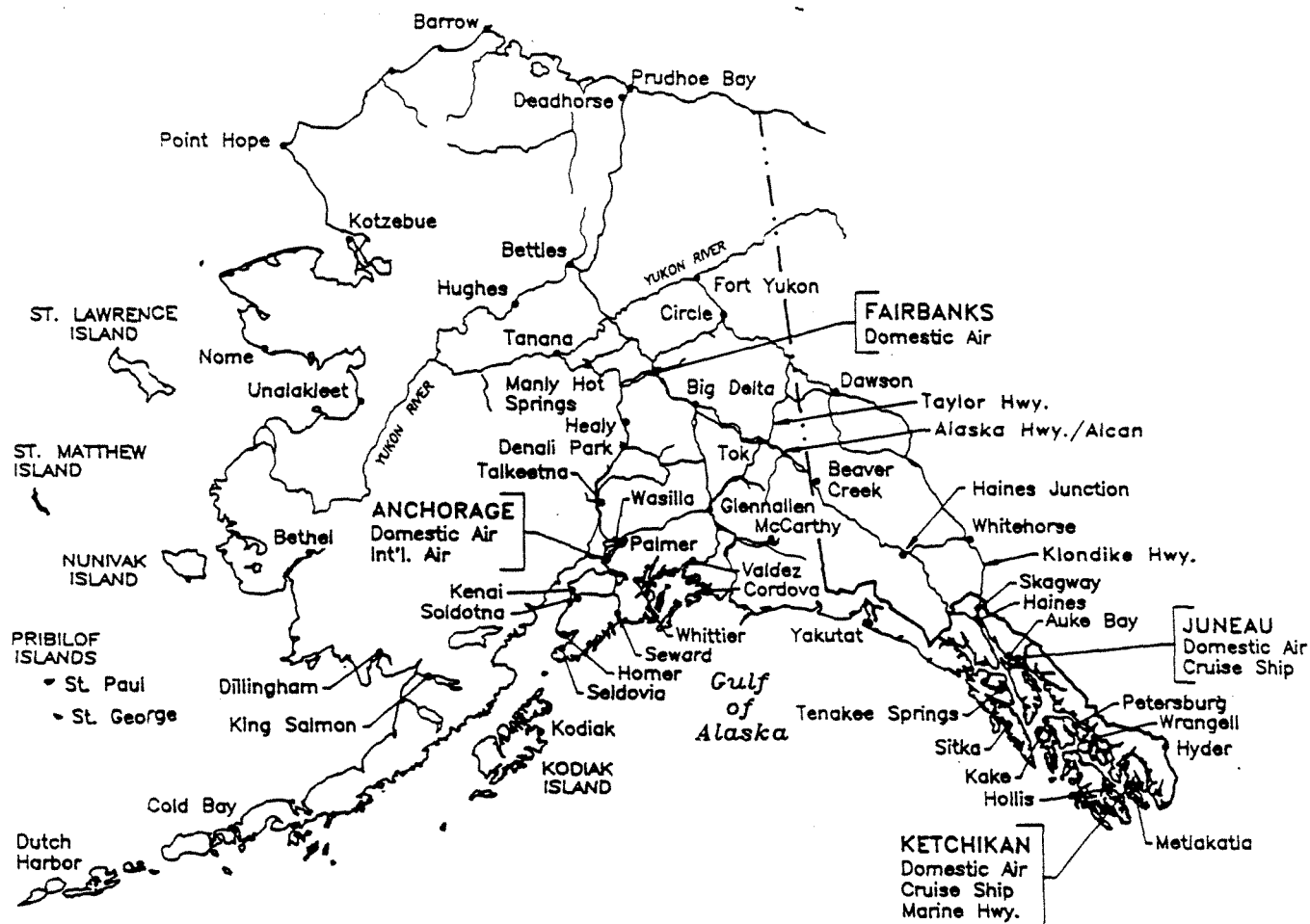
The six major reports to be generated as part of the program are:

Report	Date
1. Alaska Visitor Arrivals, Summer 1993	January 1994
2. Alaska Visitor Expenditures, Summer 1993	March 1994
3. Alaska Visitor Patterns, Opinions and Planning, Summer 1993	May 1994
4. Alaska Visitor Arrivals, Fall/Winter/Spring, 93-94	October 1994
5. Alaska Visitor Expenditures, F/W/S 93-94	November 1994
6. Alaska Visitor Patterns, Opinions and Planning, F/W/S 93-94	December 1994

Alaska Visitor Statistics Program III Phases



Random Arrival Survey Locations



ENTRY TRANSPORTATION MODE

SURVEY LOCATION	Domestic Air	Cruise Ship	Highway	Marine Highway	International Air
ANCHORAGE	X				X
FAIRBANKS	X				
JUNEAU	X	X			
KETCHIKAN	X	X		X	
Alaska Hwy.			Auto		
Klondike Hwy.			Auto		
Taylor Hwy.			Auto		

NOTE:

Marine Highway is sampled onboard vessels from Prince Rupert and Bellingham underway to Ketchikan. Alaska Highway is sampled at intersection of Taylor Highway and Alaska Highway near Tok. Klondike Highway is sampled at the U.S. Customs Service station at Skagway.

Reader Notes

Comparing Trends

Trend Tables: Chapters I and II include a number of tables comparing Summer 1993 results with the results from previous years (1986, 1989). Summer 1989 and 1993 included sampling in Skagway, while Summer 1986 did not. Summer 1993 also included sampling during May, while the previously sampled summers did not. Data is presented in these tables for all three summer sampling periods which do not include May and Skagway arrivals to allow for more accurate comparison between years. In addition, one column includes 1993 data in total, that is, with May and Skagway arrivals. See sample table below.

**Trends in Total Instate Expenditures
All Visitors
Summers 1986, 1989 and 1993
(Per Person/Per Trip - Per Party/Per Trip)**

	<—Without May Without Skagway ¹ —>			With May With Skagway
	1986	1989	1993	1993
Per Person/Per Night	\$62	\$60	\$83	\$81
Per Person/Per Trip	559	580	728	714
Per Party/Per Trip	1,006	1,217	1,499	1,479
Total Expenditures (In Millions of Dollars)	\$284.9	\$296.5	\$519.1	\$597.9

¹ Data is presented for all three summer sampling periods which do not include May or Skagway for comparative purposes.

Skagway Arrivals: Skagway arrivals were sampled for the first time during Summer 1989. In order to compare previous AVSP results from 1986, Summer 1989 and 1993 data has been prepared without Skagway arrivals.

Summer Season: The Summer Season for 1986 through 1992 was defined as June, July, August and September. For the 1993-94 AVSP, May was added to the definition of the Summer Season. In order to compare 1993 results with previous years, Summer 1993 visitor overview data has been prepared both with and without May.

Table Abbreviations: The body of this report deals with large sums of expenditures ranging between many millions and less than \$50,000. The notation <0.1 (less than 0.1 million) was used when visitor spending was less than \$50,000.

Glossary of Terms

Daily Diary Expenditures: These expenditures are recorded on the Daily Diary pages of the Visitor Expenditure Survey as the visiting party travels about the state. Essentially, these are the visitor's out-of-pocket expenditures and account for the bulk of the instate economic impacts of tourism. Daily Diary expenditures do not include transportation to and from Alaska, either in Alaska waters or in transit to/from Alaska, or spending in Canada while traveling between Southeast and mainland Alaska. The Daily Diary does include purchases of tours while in Alaska. These are shown in the tables as overnight instate tours and day tours/salmon bakes.

Entry Mode: Entry Mode refers to the transportation mode used by visitors to enter Alaska.

Expenditures Categories: These are the categories used throughout the study to define the classification of visitor spending.

Business Expenses: This is a narrowly defined category which includes secretarial, printing, conference room rentals and the like. Very few items were entered in this category as most business travel expenses are placed in other categories, i.e. lodging, food/beverage and rental car.

Clothing : This expense category includes all clothing not purchased as a gift or souvenir.

Day Tours and Salmon Bake: This category includes all those tours known as local tours, flightseeing, one-day excursions, fishing charters, salmon bakes and most scheduled performances.

Food & Beverage in Eating Places: These expenses include restaurants, lodges and food/beverage served on tours. It does not include salmon bakes.

Gifts, Souvenirs, Arts & Crafts: These expense categories are grouped together and include clothing purchased as a gift or souvenirs.

Ground Transportation: This category includes all taxi/limo, motorcoach and train transportation including transfers.

Guide Service: This expense is the amount from prepaid package tours which is attributed to a guiding function. Primarily, this represents the guide service within fishing packages and outdoor adventure packages.

Instate Air and Rental Car/RV: These expenditures include all air travel inside the state and the lease of either cars or recreational vehicles (RV) in Alaska.

Instate Ferry: This category includes Alaska Marine Highway System (Ferry) transportation to and from the state, as well as transportation which originates and ends instate. Since the Ferry system is owned by the state and all the revenues come to the state, all Ferry transportation is considered an instate expenditure.

Expenditures Categories continued.

Instate Tour Profit and Overhead: This refers to the balance remaining after the instate overnight tour components are broken down. Each component of an Overnight Instate tour is itemized and priced at market value. The remaining money is allocated to the profit and overhead category.

Lodging: These expenses include any form of expenditure for overnight facilities: hotel, resort, bed & breakfast, hostel as well as campground fees and Alaska Marine Highway System ferry berths (if purchased in Alaska), but does not include lodging on cruise ships, so Southeast per person averages are affected.

Other Entertainment, Sports and Recreation: This category includes purchases associated with sports (such as equipment or supplies for fishing) and other activities as well as admissions to events (movies, concerts) and facilities (museums). No tours are included.

Overnight Instate Tours: These tours include only those overnight tours purchased once inside Alaska. These include Arctic Tours, Denali Tours, Columbia Glacier Cruise/Tours, Overnight Cruises, etc.

Personal Expenses: include a great variety of items such as telephone, laundry, sundries/drugs, reading material for personal use, photo supplies, etc.

Personal Vehicle Expenses: These are all expenses associated with use of personal vehicles while in Alaska. These include fuel, parts, repairs, parking, RV services, waste disposal and propane.

Transportation: Transportation originating and ending within Alaska is included in this category. It does not include transportation to and from Alaska, with the exception of ferry transportation.

Undistributed Expenses: Visitor expenditures in addition to those recorded on the 29 daily pages of the diary become undistributed expenses. All visitors were asked to estimate any omissions from the diary pages. Visitors staying longer than 29 days were asked to estimate their per day expenses beyond the 29 days. Since neither the location nor the category of these expenditures are known they remain undistributed by geography and by expenditure type. Also included in this category are Overnight Instate Boat Tour expenses, which were often not easily coded to a particular community or specific expenditure category.

ModeUse: Mode use refers to the total number of users traveling by a transportation mode. This includes visitors who traveled round-trip by a single transportation mode and visitors who used the mode for one leg of their journey.

Party: A party constitutes visitors traveling together sharing expenses such as food, lodging and transportation.

Per Person Averages: Per person averages are computed based on all visitors in each visitor group. This analysis allows marketers to easily project the spending impact of increases in each visitor group. For example, the average spent on lodging in Southeast Alaska by all visitors was \$29, but only 27% of them bought lodging. Those who did buy lodging spent \$107. ($\$29 \div .27$).

Overnight Instate Tours: The Overnight Instate Tours column on some of the tables is the component breakout of all overnight tours purchased while in the state and recorded in the Daily Diary. A detailed breakout of every instate tour purchased was performed to identify the proper geographic locations of the tour's economic impact. This breakout also identifies the expenditure category of each tour component. Without this breakout, no impacts would be identified for tours purchased in one location (i.e. Anchorage) but heavily impacting other locations (i.e. Nome, Kotzebue, Valdez, Barrow). Further, the breakout identifies significant instate tour impacts in seven segments of the economy such as air transportation, food/beverage, lodging plus instate tour company profit and overhead. After all the components are priced, the balance is allocated to instate tour profit and overhead.

Prices of components are actual prices paid (net rates) by tour companies on behalf of tour customers. In cases where cash was not in the transaction (for example, a tour company marketing its own instate tour and using its own equipment), the net rate values of those tour components were used.

Elderhostel expenditures are included in the Overnight Instate Tours category.

Prepaid Tours: These are those tours which are arranged and paid for prior to the beginning of the visitor's trip, and include transportation to and from Alaska. The most common are Round Trip cruises, Cruise/Tours, tours involving the ferry system, motorcoach tours, fishing packages, and air tours. These prepaid tours are broken out into seven detailed instate expenditure categories, similar to Overnight Instate Tours discussed above. Breakouts of the prepaid tour transportation to/from and out-of-state residual components are not included in this report. Prepaid tour instate expenditures also do not include the cost of prepaid cruise fares while the ships are in Alaska waters. These prepaid costs are considered transportation to/from costs.

The methodology used for the prepaid tour component breakout is identical to that used for Overnights Instate Tours. Actual prices paid (or a comparable value when cash was not involved) are used.

Travel Type: This identifies three distinct visitor groups including package, Independent and Inde-package visitors.

Trip Purpose: This term refers to five groups developed to define the reason for taking an Alaska trip. These are Vacation/Pleasure (VP), Visiting Friends and Relatives (VFR) , Business Only (BO), Business and Pleasure (BP) and Seasonal Worker (SW).

VES: (*Visitor Expenditure Survey*) This is the actual visitor diary used to generate the information in this *Alaska Visitor Expenditures* report.



Executive Summary

Marketing Implications

Table S-1

**Instate and Out-of-State Expenditures
Summer 1993 - All Visitors
(Millions of Dollars)**

	Instate Expenditures	Out-of-State Expenditures ¹	Total Expenditures
Package	\$229.4	\$666.0	\$895.4
Independent Total	368.5	165.1	533.6
Independent	196.5	127.2	323.7
Inde-Package ²	172.0	37.9	209.9
Total	\$597.9	\$831.1	\$1,429.0

¹ Out-of-state Alaska trip expenditures include transportation to and from Alaska (including cruise ship fares) and other related expenses, except the Alaska Marine Highway System.

² Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

Table S-2

**Trends in Total Instate Expenditures
All Visitors
Summers 1986, 1989 and 1993
(Per Person/Per Trip - Per Party/Per Trip)**

	<—Without May Without Skagway ¹ —>			With May With Skagway 1993
	1986	1989	1993	
Per Person/Per Night	\$62	\$60	\$83	\$81
Per Person/Per Trip	559	580	728	714
Per Party/Per Trip	1,006	1,217	1,499	1,479
Total Expenditures (In Millions of Dollars)	\$284.9	\$296.5	\$519.1	\$597.9

¹ Data is presented for all three summer sampling periods which do not include May or Skagway for comparative purposes.

Executive Summary

In 1985 the State of Alaska Division of Tourism, with the McDowell Group of Juneau and Ketchikan, developed the *Alaska Visitors Statistics Program (AVSP)*, a survey research project designed to assess the visitor industry and its economic impact. This report, *Alaska Visitor Expenditures Summer 1993*, is the second in a series of six reports of the survey research work of the *Alaska Visitors Statistics Program III*.

Total Instate and Out-of-State Visitor Expenditures

- **Alaska visitors during Summer 1993 spent a total of \$1.4 billion on travel to, from, and within the state.** Of this \$1.4 billion, \$598 million (42%) was spent directly by visitors on goods and services in Alaska, including transportation to, from and within the state on the Alaska Marine Highway System (State Ferry). The remaining \$831 million was spent on transportation to and from the state and other related out-of-state costs. Substantial additional economic benefits of tourism in Alaska are not covered by this consumer study because industry firm spending and economic multiplier effects are not classified as direct consumer expenditures.
- **Visitors to Alaska are spending more of their total Alaska trip dollars instate than during Summers 1989 and 1986.** During Summer 1993, more than 40% of total visitor expenditures were spent instate. In Summer 1986, Alaska visitors spent 39% of their total Alaska trip dollars in the state, while in Summer 1989 they spent 37%.
- **Independent visitors were more likely than Package visitors to spend their trip dollars instate.** Of the \$534 million spent by Independent visitors, almost 70% was spent instate, compared to 26% of \$895 million spent instate by Package visitors. Inde-Package visitors, who devised their own itineraries but planned to purchase sightseeing day tours during their trip, spent 82% of their trip dollars instate.
- **There was substantial growth in total instate expenditures for all visitors between Summer 1989 and 1993.** When comparative data were prepared (see Table S-2), there was an increase of 26% in per person per trip expenditures and a 75% increase in total expenditures between Summer 1989 and 1993.
- **Varying portions (depending on the type of expenditure) of the \$831 million in out-of-state spending are returned to Alaska indirectly by employee wages, instate operations costs and capital investment by transportation and tour companies.** These are not direct visitor expenditures and are not part of this study of visitor consumer expenditure patterns. These costs have been documented in the 1991 study, *Alaska's Visitor Industry: An Economic Profile*, completed for the Alaska Division of Tourism.

Total Instate Expenditures by Category

- Visitors spent more on **Tours/Recreation** (\$175 million) than any other expenditure category. Tours/Recreation included overnight instate tours, day tours, guide service and other recreation, sports and entertainment. Nearly the same percentage of visitors made purchases in Tours/Recreation as those who purchased Gifts/Souvenirs. The only category with a higher percentage of visitors making purchases was Food/Beverage.
- **Lodging** was second in overall visitor spending, with more than one-half of all visitors purchasing in this category for a spending total of \$116 million. Third in overall spending was **Transportation** (\$109 million) purchased instate by two out of every three visitors.
- Nearly the same amount of dollars were spent on **Food/Beverage** and **Gifts/Souvenirs** by all visitors. Eighty-two percent of all visitors made purchases in Food/Beverage and 78% made purchases in Gifts/Souvenirs.
- **Clothing**, which does not include clothing purchased as gifts, and **Business Expenses** were the two smallest expense categories. Business Expenses refers to narrowly defined items such as meeting room rentals and secretarial services. Other business expenses by visitors are shown in their specific categories, such as Lodging, Food/Beverage and Transportation. **Personal Expenses**, which included stamps, laundry, sundries, magazines, newspapers, etc., represented \$14 million in spending.
- **Undistributed Expenses** of \$20 million refers to expenses with no category or geographic identity, such as expenses which exceeded the 29 daily diary pages.

Table S-3

Total Instate Expenditures by Category Summer 1993 - All Visitors

Expenditure Category	Total \$	% of Visitors Purchasing
Lodging	\$116.1	56 %
Transportation	108.5	66
Tours/Recreation	174.9	77
Food/Beverage	78.5	82
Gifts/Souvenirs	77.5	78
Personal Expenses	13.6	56
Undistributed Expenses	20.1	n/a
Clothing	8.4	17
Business Expenses	0.3	1
Total Instate Expenditures	\$597.9	100 %

Total Instate Expenditures by Trip/Visitor Characteristics

- **Trip Purpose** – Vacation/Pleasure visitors contributed 78% of instate visitor expenditures, \$467 million, the largest of any trip purpose group. Business/Pleasure ranked second in total spending with 10% (\$61 million). Those Visiting Friends/Relatives and Business Only visitors were third and fourth respectively in total visitor spending.
- **Vacation/Pleasure Spending** – Vacation/Pleasure visitors, who were 71% of Alaska's summer visitors, spent most of their dollars on Tours/Recreation (33%). Day tours accounted for 54% of the \$154 million spent on Tours/Recreation, followed by overnight instate tours at 40% or \$61 million.
- **Entry Mode** – Visitors arriving by Domestic Air contributed the largest dollar total, \$364 million or 61%, of all instate expenditures. Cruise Ship arrivals ranked second in total spending with 20% or \$120 million, followed by Highway entries spending \$62 million inside Alaska. State Ferry arrivals spent \$34 million and those arriving first by International Air contributed \$18 million.
- **Package Visitors and Independent Visitors in Total** – All Package visitors spent \$229 million, compared to all Independent Visitors (including Inde-Package visitors) who spent \$369 million.
- **Package Visitors** – Visitors traveling on a Cruise/Tour package contributed the most in visitor expenditures instate of the package visitor groups, \$127 million. Round Trip Cruise and Other Tours spent approximately the same, around \$42 million, and together accounted for 14% of total instate expenditures. Cruise/Air visitors spent \$14 million while inside Alaska.
- **Independent Visitors** – Among the Independent visitors group, Vacation/Pleasure visitors spent the largest dollar amount, \$113 million. The remaining three groups spent similar amounts. Those Visiting Friends/Relatives spent \$30 million; Business/Pleasure visitors spent \$28 million; and Business Only visitors spent \$25 million.
- **Inde-Package Visitors** – Visitors traveling as Independents but planning to purchase sightseeing during their trips are known as Inde-Package visitors. Vacation/Pleasure visitors spent the largest dollar amount of the Inde-Package group at \$129 million. Business/Pleasure followed with \$28 million. Those Visiting Friends/Relatives were third, having spent \$15 million.
- **Origin** – The West remained the largest source of visitors and of instate spending at \$167 million (28%), followed by visitors from the three other U. S. regions who spent similar amounts. Canadian visitor spending accounted for only 3% of all visitor dollars while Overseas visitor spending accounted for three times that amount.

Table S-4

Total Instate Expenditures by Trip/Visitor Characteristics
Summer 1993 - All Visitors
(In Millions of Dollars)

Trip/Visitor Characteristics	Total Expenditures
Trip Purpose	
Vacation/Pleasure	\$466.7
Visiting Friends/Relatives	45.1
Business/Pleasure	60.7
Business Only	25.3
Entry Mode¹	
Domestic Air	\$363.7
Cruise Ship	119.5
Highway ²	61.9
Ferry	34.4
International Air	18.4
Travel Type	
Package	
Round Trip Cruise	\$42.1
Cruise/Tour	126.5
Cruise/Air	13.6
Other Package Tour	47.2
Independent	
Vacation/Pleasure	113.3
Visiting Friends/Relatives	29.7
Business/Pleasure	28.4
Business Only	25.1
Inde-Package³	
Vacation/Pleasure	129.3
Visiting Friends/Relatives	14.9
Business/Pleasure	27.8
Business Only	**
Origin	
West	\$167.0
California	62.9
Washington	40.1
South	121.8
Midwest	119.0
East	112.6
Canada	19.8
Overseas	55.4
Germany/Switzerland/Austria	21.6
Great Britain	2.4
Japan	10.0
Australia/New Zealand	10.2
Other Overseas	11.2

¹ Includes spending only by those who enter by each mode. For example, Cruise Ship users spent considerably more than \$61.9 million in Alaska because the dollar total does not include those entering by another mode who used a cruise ship later in their Alaska trip.

² Highway mode includes personal vehicle expenses only. Not included are motorcoach and trucks.

³ Inde-Package visitors are independents who plan to purchase sightseeing tours during their trip.

**Sample size too small for analysis.

Average Instate Expenditures by Trip/Visitor Characteristics

The **Average Visitor** spent \$714 per person per trip while in Alaska, a 26% increase over average visitor spending in Summer 1989. The largest amounts were spent for Tours/Recreation (\$209), Lodging (\$139) and Transportation (\$130). Almost equal amounts were spent on Food/Beverage and Gifts/Souvenirs.

Average visitor instate expenditures vary for trip purpose groups depending on the trip characteristic category discussed. For instance, Vacation/Pleasure visitor average spending differed among Package and Independent visitors.

- **Trip Purpose** – Business/Pleasure visitors had the highest average expenditure of all trip purpose groups, \$905, followed by Vacation/Pleasure visitors at \$780. Those Visiting Friends/Relatives spent \$419, their largest spending category being Food/Beverage, most likely spent entertaining their hosts. Business Only had the lowest average at \$399 per person per trip.
- **Entry Mode** – International Air entries were highest in average expenditures at \$1,384. State Ferry entries spent the next highest average of \$1,183, followed by Domestic Air entries at \$820. Highway entries were \$596 per person per trip, followed by Cruise Ship entries at \$484.
- **Package Visitors** – Cruise/Tour visitors spent the most at \$1,145 per person per trip. Visitors traveling on non-cruise related tours, such as fishing packages or adventure tours spent the next highest average of \$1,031. Round Trip Cruise visitors spent the least, \$255, primarily because food and lodging were covered in their packages. Cruise Air visitors spent \$313, well below the overall average.
- **Independent Visitors** – Vacation/Pleasure visitors were the only group among the Independent visitors who spent higher than the overall average, \$827 per person per trip. Business/Pleasure spent the next highest average of \$642 followed by Business Only at \$401. Those Visiting Friends/Relatives had the lowest average of \$341 which is less than half of the overall average spending.
- **Inde-Package Visitors** – All Inde-Package visitors spent above the overall average of \$714 per person per trip. Business/Pleasure visitors spent more than twice the overall average, \$1,816, followed by Vacation/Pleasure visitors at \$1,179. Those Visiting Friends/Relatives averaged \$793 per person per trip.
- **Origin** – Pacific Region visitors spent more on average than any other Overseas group. Visitors from Japan spent more than twice the overall average instate expenditure, \$1,552. Australia/New Zealand and the Germanic countries also spent significantly more than the overall average. Canada had the lowest average of any visitor group by origin.

Although the Western U. S. supplied the most visitors, Eastern visitors out spent them almost two to one, averaging \$1,111 per person per trip. Visitors from the Midwest averaged \$835, followed by those from the South at \$723. The West as a group had an overall per person average of \$576.

Table S-5

Average Instate Expenditures by Trip/Visitor Characteristics
Summer 1993 - All Visitors
(Per Person - Per Trip)

Trip/Visitor Characteristics	Per Person Per Trip
Trip Purpose	
Vacation/Pleasure	\$780
Visiting Friends/Relatives	419
Business/Pleasure	905
Business Only	399
Entry Mode¹	
Domestic Air	\$820
Cruise Ship	484
Highway ²	596
Ferry	1,183
International Air	1,384
Travel Type	
Package	
Round Trip Cruise	\$255
Cruise/Tour	1,145
Cruise/Air	313
Other Package Tour	1,031
Independent	
Vacation/Pleasure	827
Visiting Friends/Relatives	341
Business/Pleasure	642
Business Only	401
Inde-Package³	
Vacation/Pleasure	1,179
Visiting Friends/Relatives	793
Business/Pleasure	1,816
Business Only	..
Origin	
West	576
California	603
Washington	471
South	723
Midwest	835
East	1,111
Canada	260
Overseas	994
Germany/Switzerland/Austria	1,090
Great Britain	350
Japan	1,552
Australia/New Zealand	1,187

¹ Includes spending only by those who enter by each mode. For example, Cruise Ship users spent considerably more than \$484 per person per trip because the dollar total does not include those entering by another mode who used a cruise ship later in their Alaska trip.

² Highway mode includes personal vehicle expenses only. Not included are motorcoaches and trucks.

³ Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

..Sample size too small for analysis.

Total and Average Instate Expenditures by Region

- The **Southcentral** region was the major beneficiary of visitor spending of all the Alaska regions (\$251 million) and had the second highest per person per trip expenditures at \$451.
- The **Southwest** had the second smallest amount of visitor spending of all the Alaska regions (\$24 million) but the highest per person per trip average at \$839.
- **Southeast** Alaska had the second highest amount of total instate expenditures at \$152 million, more than twice the Summer 1989 amount of \$66 million. The average expenditures for Southeast ranked third at \$324 per person per trip.
- The **Interior/North** region received \$79 million from all visitors and averaged \$261 on instate expenditures.
- The popular **Denali/McKinley** region received \$40 million in total visitor expenditures, considerably more than received in Summer 1989. Again, as in Summer 1989, this region had the lowest per person per trip average of \$163.
- Total expenditures on the Alaska Marine Highway System (**Instate Ferry**) totaled nearly \$20 million with average expenditures of \$304 per person per trip. These amounts directly benefit the State. Transportation to and from the state by Ferry are included with instate expenditures since the system is State-owned and operated.
- Spending in unidentified locations (undistributed) totaled almost \$33 million.

Table S-6

Total and Average Instate Expenditures by Region Summer 1993 - All Visitors

Region	Total Expenditures (Millions of Dollars)	Average Expenditures (Per Person/Per Trip)
Southeast	\$152.4	\$324
Southcentral	250.5	451
Interior/North	79.1	261
Southwest	23.5	839
Denali/McKinley	40.4	163
Instate Ferry	19.5	304
Undistributed	32.5	n/a
Total	\$597.9	\$714

Expenditures by Community

- **Anchorage** attracted the largest community share of Alaska's visitor expenditures, \$163 million. This was 27% of the statewide total and almost three times the amount of the number two community, Fairbanks.
- **Fairbanks** ranked second with \$58 million in total expenditures, 10% of the statewide total. **Juneau** followed closely at \$53 million and 9% of the statewide total.
- **Ketchikan** and **Skagway** attracted similar amounts and percentages of total instate expenditures, around \$29 million.
- **Kenai/Soldotna** ranked sixth with \$17 million received in visitor spending.
- **Sitka**, **Homer** and **Seward** were next with total instate expenditures of between \$12 and \$14 million. **Valdez**, located in Prince William Sound, ranked tenth this year, receiving \$9 million in total instate expenditures.
- In total, these ten communities attracted \$396 million in visitor spending, representing two-thirds of total instate expenditures.

Table S-7

Top 10 Communities in Visitor Expenditures Summer 1993 - All Visitors

Community	Total Expenditures	% of State Total
Anchorage	\$162.5	27 %
Fairbanks	57.9	10
Juneau	53.0	9
Ketchikan	29.6	5
Skagway	29.2	5
Kenai/Soldotna	16.9	3
Sitka	13.8	2
Homer	12.1	2
Seward	11.9	2
Valdez	9.2	2

Marketing Implications

Summer 1993 VES results are compared with two previously sampled summer seasons, 1986 and 1989. Both these summer seasons were not necessarily representative of an average summer season in Alaska due to two extraordinary events. Alaska benefited considerably in Summer 1986 from Expo '86 in Vancouver which drew record crowds to British Columbia and Alaska. As a result, Summer 1987 visitor volume actually declined but was still greater than the summer before Expo. By 1989, visitor volume began to exceed 1986 levels, only to be disrupted in some regions of the state by the *Exxon Valdez* oil spill in March. Total instate and spending patterns around the state were altered as a result of the spill.

Summer 1993 *Visitor Expenditure Survey* results shed new light on the impacts of various visitor markets. In spite of the two previously sampled summers unique circumstances, relevant trends can be seen in the Summer 1993 data. This section highlights a few of the study results and trends which are important in overall market planning for the Alaska visitor industry. There are many more study results within the body of the document which have implications for specific market segments in addition to those discussed here. Shotgun marketing approaches are not an effective way to reach Alaska visitors. Marketers need to clearly define their market segments and understand their characteristics. The reader is encouraged to review sections of specific interest within this report for additional market information.

- 1) **Visitors to Alaska are spending more of their total Alaska trip dollars instate than in Summers 1989 and 1986.** By Summer 1993, nearly 42% of total Alaska trip dollars were spent instate, compared to 37% in 1989. Competitive cruise and air fares made it less costly for visitors to come to Alaska. As a result, more of their travel dollar was spent in Alaska rather than on transportation to and from the state. Travel costs to and from Alaska are likely to remain competitive in the future. Therefore, Alaska marketers can take advantage of these transportation savings by featuring more instate travel opportunities. Results suggest many Alaska marketers have already discovered this opportunity.

- 2) **Total spending growth is greater than visitor volume growth combined with inflation.** Three factors contributed to the growth in total instate visitor expenditures since 1989: the total growth of visitors (about 40% since Summer 1989), the inflation rate (18% in four years), and the increased instate spending by the visitor. The largest instate spending increase appeared in the Tours/Recreation expenditure category, which grew more than two and one-half times the 1989 level. The volume of day tours nearly doubled since 1989, while the volume of overnight tours more than doubled. Clearly, more tour opportunities have developed for visitors and visitors are responding positively.
- 3) **Instate tour growth is significant and points to new opportunities for visitor industry infrastructure development.** Increases in tour and recreation opportunities and spending are very important for the Alaska visitor industry for a number of reasons. First, many of these types of offerings are entrepreneurial developments within the small business community. It is the first venture into the visitor industry arena for some of these small businesses. Alaska visitor industry business managers developed and expanded instate day and overnight tours in response to a perceived market need and the market has responded well.

The interest in these types of tours is obviously high among visitors, suggesting there is room for additional tour development. Based on this expenditure data, today's Alaska visitors are voracious consumers of tour activities, more so than in the past. Based on current travel trends, future Alaska visitors are likely to continue to behave in the same fashion suggesting the need for more and expanded day and overnight tours.

- 4) **Each of Alaska's visitor groups makes important contributions to overall instate spending.** Although some Alaska visitor groups have a greater economic impact on the State than others, each group has unique spending patterns, impacting different locations and a variety of businesses. The most meaningful analysis in the report is by trip purpose, mode use, travel type and origin. Here are key implications of the spending patterns among each of these subgroups.

Trip Purpose: Vacation/Pleasure (VP) visitors are, by far, the most significant spending group accounting for eight of ten visitor dollars. Their impacts are felt throughout the state. Business and Pleasure visitors (BP) and those Visiting Friends and Relatives (VFR) represent one in ten visitor dollars each. These three groups, VPs, BPs and VFRs are the groups impacted by marketing efforts. They make heavy tour and recreation purchases, in particular. Marketers should review regional spending patterns among these trip purpose groups in order to refine marketing strategies.

Mode Use: An analysis of visitors by transportation mode used to enter and/or exit the state provides the total impact of each transportation mode. Marketers are encouraged to review the mode use spending patterns among all visitors found in Chapter I, and among Vacation/Pleasure visitors only, found in Chapter III. Marketers of overnight instate tours, for example, will learn that visitors using Domestic Air or International Air to enter or exit the state are the most likely to purchase these types of tours. Marketing strategies targeted to these visitors are likely to generate increased instate tour sales.

Travel Type: Travel type groups include Package visitors, Independents and Inde-package visitors. Independents and Inde-package visitors combined spend approximately 60% of all visitor dollars. Package visitors contribute 40%. The premium value markets among travel type groups include Cruise/Tour visitors (a Package visitor) and Inde-Package visitors. These two groups alone contribute half of all visitor dollars and have the highest per person per trip average spending of any travel type group. Clearly, more instate tour opportunities for both Cruise/Tour and Inde-Package visitors will yield positive results.

One other travel type observation bears mentioning in this section. The Inde-package visitor is changing. In some cases, the line appears to be blurring between an Inde-package visitor and some Cruise visitors. It appears that a segment of the Cruise market cruises to Alaska and then proceeds to visit other parts of the state as an Independent or Inde-package visitor. Inde-package visitors in the past typically arrived by Air, Ferry or Highway. Today, they are also arriving by Cruise Ship. These visitors purchase some of their instate tour packages prior to departure to Alaska and some after they arrive in the state. Marketing to these visitors before and after they arrive in the state will become even more important in the future.

Origin: Study results identify several high value origin market segments. Premium value markets in the United States, in terms of per person spending, include the South and East. High value markets among Overseas visitors include the Japanese with the highest per person spending of any origin group (\$1,555 per person per trip), the Australia/New Zealand crowd (\$1,187 per person per trip) and those from the Germanic countries (\$1,083 per person per trip). The next report in the AVSP series (*Patterns, Opinions, and Planning*) will give marketers a greater understanding of the travel patterns for these origin groups. Combined with this expenditure information, marketers can better target visitors from different areas in their marketing appeals, and refine products and services to meet the market needs.

5) The impact of the Alaska visitor industry is felt throughout the state.

Although Alaska's largest communities are major beneficiaries of visitor dollars, more of these dollars are finding their way into smaller communities and more remote locations. Businesses and communities, whether large or small, should study the total expenditures received from visitors, their spending patterns and characteristics of visitors in their region (see Chapter II). This type of study provides important direction regarding target markets for regions and communities. For example, marketers in Southeast Alaska will see that visitors arriving in Alaska by Domestic Air spend heavily in their region. To capture greater benefits from these visitors, marketers may want to include strategies that concentrate on increasing the size of the overall Domestic Air market or market more heavily to these visitors once they have arrived in the state.

6) The month of May is generating a significant amount of summer visitor dollars. In Summer 1993, May alone generated approximately \$80 million or 13% of all summer visitor dollars. Incentives designed to generate May travel (e.g. reduced cruise fares, etc.) have clearly made an impact on what was considered a shoulder season month. This expansion into May demonstrated that an early season venture to Alaska can be successful, not only in terms of product offerings but also in terms of revenue generated. As May continues to grow as a legitimate summer travel month, businesses and communities can seize the opportunity to expand visitor products and services.

Chapter I: Statewide Overview

Expenditures of All Visitors

Expenditures by Trip Purpose

Expenditures by Entry Mode

Expenditures by Mode Use

Expenditures by Travel Type

Expenditures by Origin

Statewide Overview of Instate Expenditures

This chapter contains a detailed analysis of visitor expenditures within the state from May to September 1993. The only form of transportation expenditures to and from Alaska included in this analysis is the Alaska Marine Highway (Ferry), since it is a State-owned and operated system. Other out-of-state expenditures related to Alaska travel are not included. The totals shown in these data include all instate visitor expenditures recorded in the daily diary by visitors while traveling in the state.

The six sections of this chapter present data for all visitors, by trip purpose, entry mode, mode use, travel type and origin. For all visitors, the analysis includes total expenditures, per person per night and trip, per party per night and trip, and the percent of visitor spending in each category. For trip purpose, entry mode, mode use, travel type and origin, there are analyses of total expenditures and average per person per trip expenditures.

Visitor averages are computed based upon all visitors for each trip or visitor characteristic. This analysis allows marketers to project the spending impact of increases in each visitor group.

Instate expenditures by region are detailed in Chapter II and an in-depth analysis of Vacation/Pleasure visitors can be found in Chapter III. Other information on transportation to and from Alaska and other out-of-state expenditures can be found in Chapter IV.

Expenditures of All Visitors

Total Instate Expenditures by Category

Visitors to Alaska spent a total \$598 million in Alaska during Summer 1993. Tours/Recreation accounted for almost 30% of all expenditures, followed by Lodging and Transportation which together represented almost 40% of total spending. Food/Beverage and Gifts/Souvenirs followed, each representing approximately 13% of all expenditures.

Of the \$175 million spent on Tours/Recreation, \$92 million went to day tours/salmon bake and another \$70 million to overnight instate tours. These two categories represented more than one-quarter of total expenditures. \$116 million was spent on Lodging. Transportation, which accounted for \$109 million in total dollars, had \$60 million spent on ground transportation and rental car/RV, while other forms of transportation shared almost equally the remaining expenditures. Gifts and souvenir clothing accounted for \$58 million of the \$78 million spent in the Gifts/Souvenirs category. Other spending in this category included Alaska Native and Alaska made arts and crafts.

Undistributed expenses are in addition to those recorded on the 29 daily diary pages, or expenses related to overnight instate boat tours. Neither the location or the category of these expenditures are known, therefore they remain undistributed by geography and expenditure type.

Graph I-A

Total Instate Expenditures By Category
Summer 1993 - All Visitors
(In Millions of Dollars)

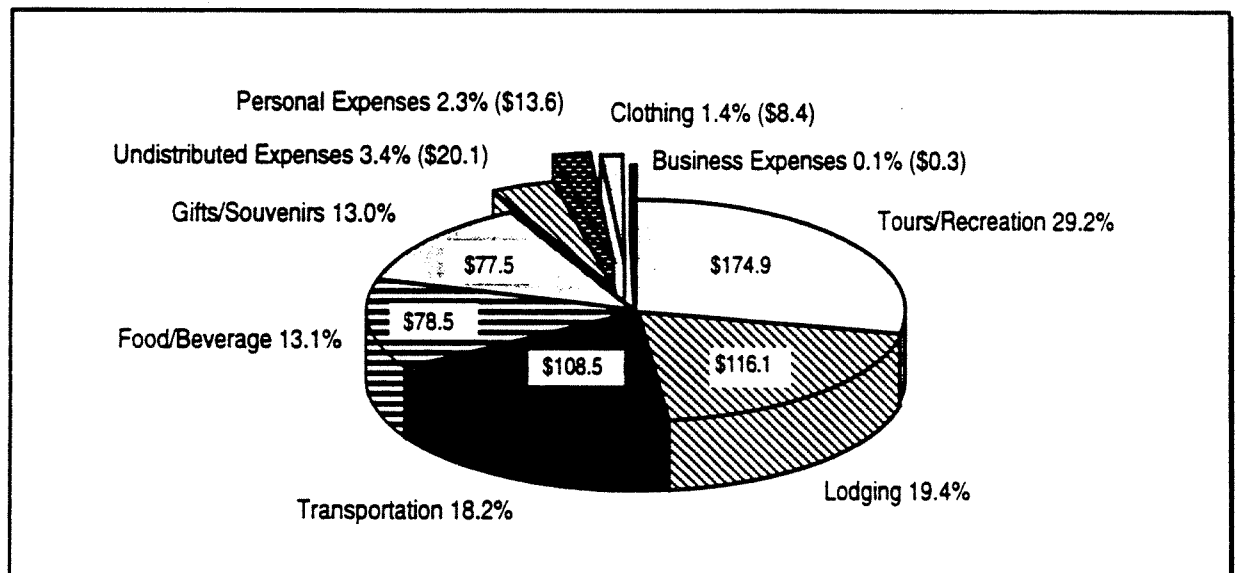


Table I-A

Total Instate Expenditures by Category
Summer 1993 - All Visitors
(In Millions of Dollars)

Expenditure Category	Total Dollars	% of Total Expenditures
Lodging	\$116.1	19.4 %
Transportation	108.5	18.2
Ground Transportation	34.3	5.7
Instate Air	14.3	2.4
Rental Car/RV	25.2	4.2
Personal Vehicle Expenses	16.5	2.8
Instate Ferry	17.9	3.0
Tours/Recreation	174.9	29.2
Day Tours/Salmon Bake	91.7	15.3
Overnight Instate Tours	70.0	11.7
Guide Service	2.5	0.4
Other Entertainment/Sports	10.7	1.8
Food/Beverage	78.5	13.1
In Eating Places	56.7	9.5
In Bars & Lounges	3.8	0.6
In Stores	18.0	3.0
Gifts/Souvenirs	77.5	13.0
Souvenir Clothing	22.2	3.7
Alaska Native Arts & Crafts	9.7	1.6
Other Alaska Made Arts & Crafts	9.4	1.6
All Other Gifts	36.2	6.1
Personal Expenses	13.6	2.3
Clothing	8.4	1.4
Business Expenses	0.3	0.1
Undistributed Expenses	20.1	3.4
Total Instate Expenditures	\$597.9	100.0 %

Sources of Expenditures by Category

Visitor instate expenditures were calculated from several different sources in the Visitor Expenditure Diary. Table I-B on the opposite page presents the different sources and the contribution of each source for each expenditure category.

Prepaid expenditures were derived from prepaid package tours. Each tour was broken down into its components and expenses were recorded in their respective component category.

During Summer 1993, \$108 million came from prepaid sources, accounting for nearly 18% of total instate expenditures. Almost one-half was spent on Lodging and more than one-third was spent on Transportation.

Daily Diary expenditures were those recorded each day in the Visitor Expenditure Diary as the visitor traveled about the state. These expenditures accounted for three-quarters of visitor instate spending.

Overnight Instate Tours were also recorded in the Daily Diary. They were separated on Table I-B to show the impact of these tours on each expenditure category. Overnight instate tours accounted for 12% of total Tours/Recreation expenditures. Overnight instate tours also represented 14% total Daily Diary expenditures. Transportation received 8% of its total from overnight instate tours. Guide service was often utilized in the overnight instate tours category as well.

Ferry Transportation to and from the state is shown separately to demonstrate the impact of Ferry transportation spending on the total. The \$14 million spent, whether for transportation to and from the state or bought during the visitors' trip in Alaska, was an instate expenditure. The Ferry is a State-owned system and therefore all revenues accrue to the state.

Table I-B

Sources of Expenditures by Category
Summer 1993 - All Visitors
(In Millions of Dollars)

Expenditure Category	Prepaid	Daily Diary	Ferry To/From	Overnight Instate Tours ¹	TOTAL ³
Lodging	\$52.5	\$63.6	-	\$9.8	\$125.9
Transportation	38.0	56.2	14.3	10.0	118.5
Ground Transportation	29.9	4.4	-	3.5	37.8
Instate Air	7.3	7.0	-	6.4	20.7
Rental Car/RV	0.1	25.1	-	<0.1 ⁴	25.2
Personal Vehicle Expenses	-	16.5	-	-	16.5
Instate Ferry	0.7	2.9	14.3	0.1	18.0
Tours/Recreation²	15.7	159.2	-	22.5	197.4
Day Tours/Salmon Bake	12.8	78.9	-	3.4	95.1
Overnight Instate Tours	-	70.0	-	2.3 ⁵	70.0
Guide Service	2.5	<0.1	-	15.8	18.3
Other Entertainment/Sports	0.4	10.3	-	1.0	11.7
Food/Beverage	0.8	77.8	-	3.9	82.5
In Eating Places	0.8	55.9	-	3.9	60.6
In Bars & Lounges	-	3.8	-	-	3.8
In Stores	-	18.0	-	-	18.0
Gifts/Souvenirs	-	77.5	-	-	77.5
Souvenir Clothing	-	22.2	-	-	22.2
Alaska Native Arts & Crafts	-	9.7	-	-	9.7
Other Alaska Made Arts & Crafts	-	9.4	-	-	9.4
All Other Gifts	-	36.2	-	-	36.2
Personal Expenses	-	13.6	-	0.3	13.9
Clothing	-	8.4	-	-	8.4
Business Expenses	-	0.3	-	-	0.3
Undistributed Expenses	-	-	-	-	19.5
Instate Tour Profit Overhead	-	-	-	10.4	10.4
Total Instate Expenditures⁶	\$107.5	\$456.5	\$14.3	\$70.0	\$597.9

¹ From Daily Diary

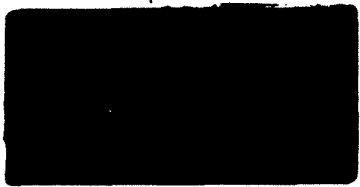
² Tours/Recreation total for Daily Diary includes overnight instate tours. Overnight instate tours are also shown here by their contribution to each expense category.

³ Grand total (\$597.9 million) does not equal the sum of the total column to avoid double counting of Overnight Instate Tours under both Daily Diary and Overnight Instate Tour columns.

⁴ The notation <0.1 indicates spending less than 0.1 million dollars. This was used for expenditures totaling less than \$50,000.

⁵ This includes expenditures made by Elderhostel travelers.

⁶ Total Expenditures do not always add up to the total due to rounding.



Trends in Total Instate Expenditures

While there were no significant differences in visitor spending from 1986 to 1989, there was substantial growth in 1993. The 1989 and 1993 information indicated a 26% increase in per person per trip expenditures and a 76% increase in total expenditures.

In terms of real dollars, the apparent increase in overall visitor spending of 4% between Summers 1986 and 1989 barely kept pace with Alaska's overall inflation rate of 3.6%. During this period of time, the number of visitors were nearly the same. However, the number of visitors between 1989 and 1993 increased from 513,200 to 713,200 (39%). Alaska's overall inflation rate was 17.9% (an annual average growth rate of 4.2%). In addition to this fairly high rate of inflation, there was significant growth in visitor spending between Summers 1989 and 1993.

Ferry transportation was not included in the expenditures for Summer 1986. If it were included, the per person per trip and total expenditures (for Summer 1986) would nearly equal the Summer 1989 figures. Ferry transportation was included in the expenditures for Summers 1989 and 1993.

Table I-D

Trends in Total Instate Expenditures All Visitors Summers 1986, 1989 and 1993 (Per Person/Per Trip - Per Party/Per Trip)

	<—Without May Without Skagway ¹ —>			With May With Skagway
	1986	1989	1993	1993
Per Person/Per Night	\$62	\$60	\$83	\$81
Per Person/Per Trip	559	580	728	714
Per Party/Per Trip	1,006	1,217	1,499	1,479
Total Expenditures (In Millions of Dollars)	\$284.9	\$296.5	\$519.1	\$597.9

¹ Data is presented for all three summer sampling periods which do not include May or Skagway for comparative purposes.

Trends in Total Instate Expenditures by Categories

Overall, total visitor spending increased by 83% between Summers 1986 and 1993; 82% between Summers 1989 and 1993. Considering an overall inflation rate in Alaska of 17.9%, total visitor spending in real dollars experienced a significant increase.

Increases in overall visitor spending since Summer 1989 were apparent in every expense category except Personal Expenses and Business Expenses. The most notable was Tours/Recreation with a 196% increase. Day tours/salmon bake and overnight instate tours were primarily responsible for this dramatic change. In Summer 1986, overnight instate tours accounted for approximately \$45 million (including guide service). This figure dropped to \$15 million in Summer 1989, when the Columbia Glacier Cruise Tour was not available, a result of the *Exxon Valdez* oil spill of March 24, 1989. It was at this time that day tours gained in popularity, a trend which continued through Summer 1993.

Gifts/Souvenirs experienced a 69% gain compared to Summer 1989, as did Lodging. Transportation and Food/Beverage followed at 58% and 53%, respectively. Again, in Summer 1986, Ferry transportation to and from Alaska was not included in the Transportation expense category, as it was in Summers 1989 and 1993.

Table I-E

**Trends in Instate Expenditures
All Visitors
Summers 1986, 1989 and 1993
(In Millions of Dollars)**

Expenditure Category	← Without May Without Skagway ¹ →			With May With Skagway 1993
	1986	1989	1993	
Lodging	\$61.1	\$65.5	\$110.4	\$125.9
Transportation	68.2	64.3	101.5	118.5
Tours/Recreation ²	82.8	62.2	183.9	197.4
Food/Beverage	51.7	45.4	69.3	82.5
Gifts/Souvenirs	35.2	39.2	66.3	77.5
Personal Expenses	8.5	12.2	12.0	13.6
Clothing ³	9.0	4.1	7.8	8.4
Business Expenses	0.2	0.2	0.1	0.3
Undistributed Expenses	8.8	7.3	16.8	19.5
Instate Profit/Overhead	10.8	1.0	10.2	10.4
Total Instate Expenditures⁴	\$284.9	\$296.5	\$519.1	\$597.9

¹ Data is presented for all three summer sampling periods which do not include May or Skagway for comparative purposes.

² Tours/Recreation category includes overnight instate tours.

³ Clothing category in 1986 included clothing purchased as gifts. Clothing category in 1989 and 1993 did not include clothing purchased as gifts.

⁴ Totals do not equal the sum of the total columns to avoid double counting of overnight instate tours included in the expenditure category amounts used on this table.

Expenditures By Trip Purpose

Total Instate Expenditures by Trip Purpose

Vacation/Pleasure (VP) visitors represented almost three-quarters (71%) of all visitors and spent \$467 million, or 78% of total expenditures, in Summer 1993. The second largest spenders were **Business and Pleasure (BP)** visitors with a total of \$61 million (10% of total spending), although they were only 7% of total visitor arrivals. Those **Visiting Friends and Relatives (VFR)** contributed \$45 million or 8% of total spending followed by **Business Only (BO)** visitors who represented 10% of all visitor arrivals and provided \$25 million (4% of total spending).

Each trip purpose group had different expenditure patterns. VPs spent more of their dollars on Tours/Recreation than in any other category. Food/Beverage captured more of the VFR dollar than any other category, probably due to VFRs entertaining their Alaska hosts or replenishing household foodstuffs. Lodging accounted for most of the dollars spent by both categories of Business travelers.

Graph I-B

Total Instate Expenditures by Trip Purpose
Summer 1993 - All Visitors
(In Millions of Dollars)

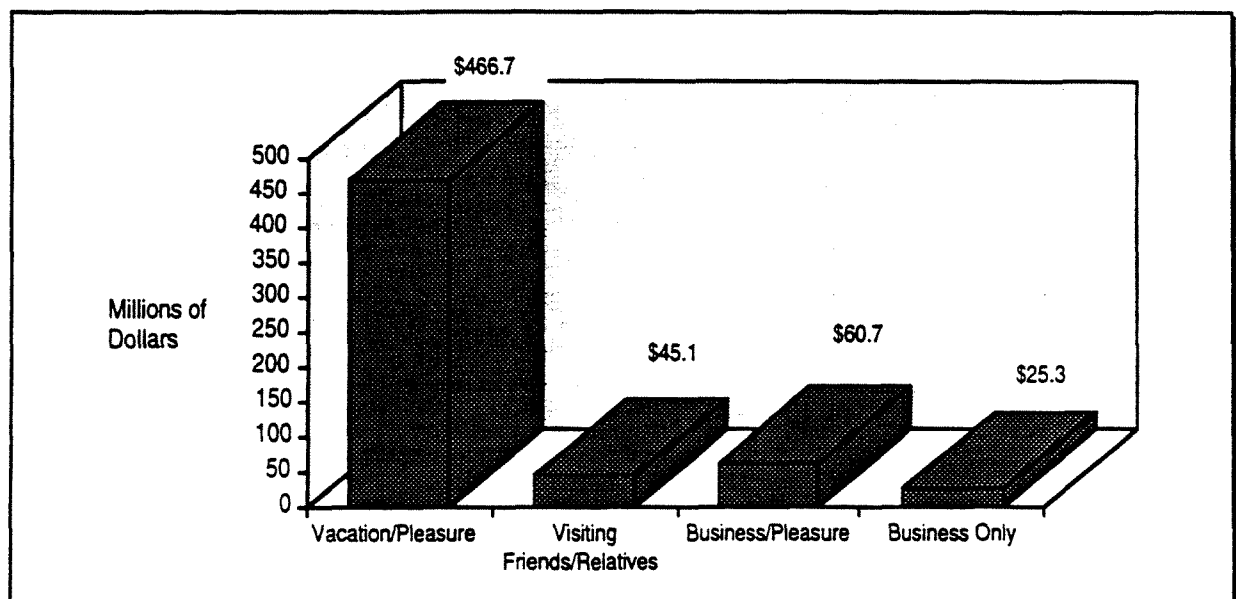


Table I-F

Total Instate Expenditures by Trip Purpose
Summer 1993 - All Visitors
(In Millions of Dollars)

Expenditure Category	Vacation Pleasure	VFR	Business & Pleasure	Business Only
Lodging	\$84.7	\$3.8	\$17.1	\$10.5
Transportation	86.5	6.6	10.8	4.7
Ground Transportation	32.6	0.8	0.6	0.4
Instate Air	10.7	1.1	1.5	1.1
Rental Car/RV	12.9	2.0	7.4	2.9
Personal Vehicle Expenses	13.9	1.4	0.9	0.3
Instate Ferry	16.2	1.3	0.3	<0.1
Tours/Recreation	153.8	9.1	11.7	0.2
Day Tours/Salmon Bake	83.3	3.9	4.3	0.1
Overnight Instate Tours	61.2	3.3	5.5	-
Guide Service	1.9	-	0.6	-
Other Entertainment /Sports	7.4	1.8	1.4	0.1
Food/Beverage	50.0	11.2	10.9	6.3
In Eating Places	35.9	7.5	8.2	5.0
In Bars & Lounges	2.5	0.3	0.7	0.4
In Stores	11.7	3.4	2.0	0.9
Gifts/Souvenirs	62.9	8.0	4.8	1.7
Souvenir Clothing	17.4	2.7	1.7	0.4
Alaska Native Arts & Crafts	7.8	0.9	0.9	0.1
Other Alaska Made Arts & Crafts	8.3	0.9	0.2	0.1
All Other Gifts	29.4	3.5	2.1	1.2
Personal Expenses	7.4	2.2	2.6	1.4
Clothing	6.0	1.0	1.4	<0.1
Business Expenses	<0.1¹	0.1	0.2	<0.1
Undistributed Expenses	15.4	3.0	1.3	0.4
Total Instate Expenditures²	\$466.7	\$45.1	\$60.7	\$25.3

¹ The notation <0.1 indicates spending less than 0.1 million dollars. This was used for expenditures totaling less than \$50,000.
² Total Expenditures do not always add up to the total due to rounding.

Average Instate Expenditures by Trip Purpose

Business and Pleasure (BP) visitors had the highest per person per trip level of spending at \$905, which was \$191 per person higher than the overall visitor average. VP visitors were second highest at \$780 per person per trip, which was \$361 more than the average for VFR of \$419. Business Only visitors spent the least, at \$399 per person, on average.

Vacation/Pleasure visitors spent one-third of their average dollars per person per trip on Tours/Recreation. They spent almost equal averages on Lodging and Transportation, followed by Gifts/Souvenirs.

The highest average for VFRs was Food/Beverage. Since VFRs were more likely to stay with friends or relatives, little was spent on Lodging or Transportation. A larger share of their dollars went to Food/Beverage as they probably entertained their Alaska hosts.

Business and Pleasure visitors had the highest average for Lodging, followed by Tours/Recreation. They spent almost equal amounts on Transportation and Food/Beverage. Lodging and Food/Beverage were the major expenditure categories for Business Only visitors.

Graph I-C

**Average Instate Expenditures by Trip Purpose
Summer 1993 - All Visitors
(Per Person/Per Trip)**

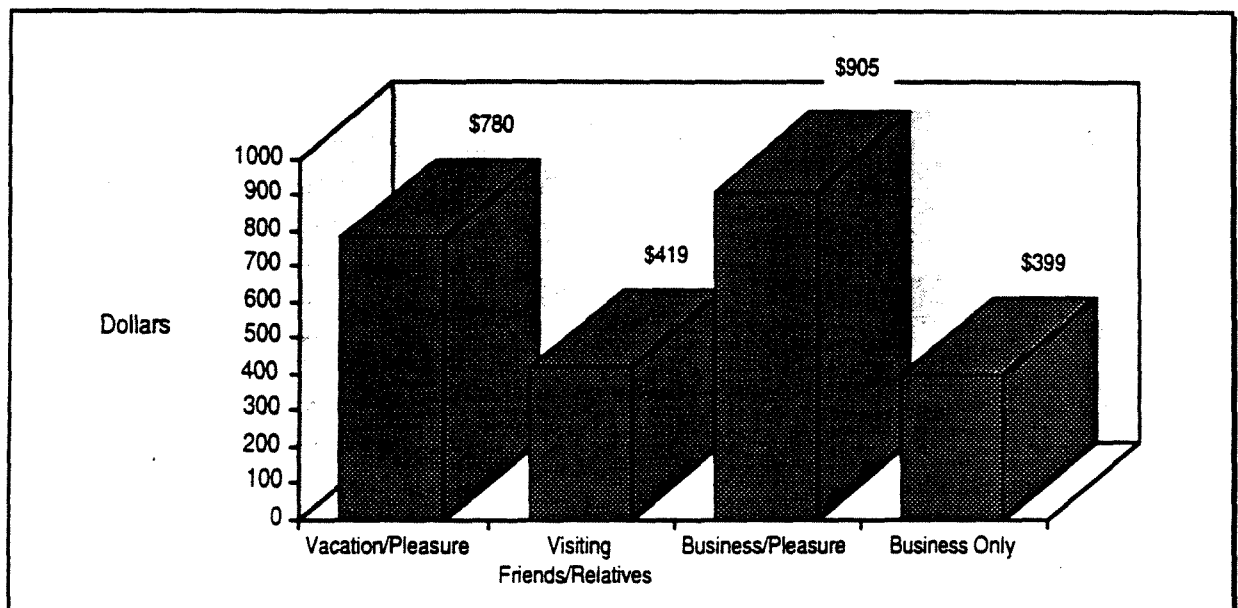


Table I-G

Average Instate Expenditures by Trip Purpose
Summer 1993 - All Visitors
(Per Person/Per Trip)

Expenditure Category	Vacation Pleasure	VFR	Business & Pleasure	Business Only
Lodging	\$142	\$36	\$254	\$166
Transportation	144	62	160	73
Ground Transportation	54	8	9	6
Instate Air	18	10	22	17
Rental Car/RV	22	18	111	45
Personal Vehicle Expenses	23	13	14	5
Instate Ferry	27	12	5	-
Tours/Recreation	257	84	175	4
Day Tours/Salmon Bake	139	36	63	2
Overnight Instate Tours	102	31	81	-
Guide Service	3	-	9	-
Other Entertainment /Sports	12	17	21	1
Food/Beverage	84	104	163	100
In Eating Places	60	70	123	79
In Bars & Lounges	4	2	10	7
In Stores	19	32	30	14
Gifts/Souvenirs	105	75	71	27
Souvenir Clothing	29	25	25	6
Alaska Native Arts & Crafts	13	9	13	1
Other Alaska Made Arts & Crafts	14	8	3	1
All Other Gifts	49	33	31	19
Personal Expenses	12	21	38	22
Clothing	10	9	20	-
Business Expenses	-	1	3	1
Undistributed Expenses	26	28	19	6
Total Instate Expenditures	\$780	\$419	\$905	\$399

Trends in Total Instate Expenditures by Trip Purpose

Vacation/Pleasure visitors had the largest increase (97%) in total instate expenditures between Summers 1989 and 1993. VFRs, who experienced a healthy increase in overall spending between Summers 1986 and 1989, actually declined in Summer 1993. BP visitors had the second largest increase (55%) in total instate expenditures. Business Only visitors, with a 25% increase between Summers 1989 and 1993 and a 45% increase in overall visitor spending in 1993, seem to have regained the ground lost since 1986.

With an overall inflation rate in Alaska of 17.9%, the increase in total instate expenditures in real dollars was substantial. Overall growth in visitor volume between Summers 1989 and 1993 was 39%, or an annual average of nearly 9% per year. The visitor market grew close to 60% since September 1985. Vacation/Pleasure visitors have nearly doubled in the same time period, growing 87%.

With more visitors, there was more spending primarily because there were more opportunities for instate expenditures than ever before. The overall Summer season market has gained considerable momentum in recent years. Alaska's infrastructure which serves the visitor industry has grown to meet the demand.

Table I-H

Trends in Expenditures by Trip Purpose All Visitors Summers, 1986, 1989 and 1993 (In Millions of Dollars)

	<—Without May Without Skagway ¹ —>			With May With Skagway
	1986	1989	1993	1993
Vacation/Pleasure	\$214.6	\$213.9	\$420.7	\$466.7
Visiting Friends/Relatives	15.0	38.6	35.4	45.1
Business and Pleasure	23.2	26.5	41.1	60.7
Business Only	22.1	17.5	21.9	25.3
Total - All Visitors	\$284.9	\$296.5	\$519.1	\$597.9

¹ Data is presented for all three summer sampling periods which do not include May or Skagway for comparative purposes.

Trends in Average Expenditures by Trip Purpose

The overall average per person per trip expenditure increased 26% since Summer 1989, 30% since Summer 1986. Despite the overall inflation rate, this represented an increase in average visitor expenditures.

Vacation/Pleasure visitors had a 26% increase between Summers 1989 and 1993. Even with an overall inflation rate of 17.9%, this represents a gain in average expenditures for VPs. Between Summers 1989 and 1993, VFRs exhibited no real difference in their average expenditures.

Business and Pleasure visitors, whose expenditures declined between Summers 1986 and 1989, gained 52% in average expenditures. However, Business Only visitors spent a bit less in real dollars (18%) which when discounting inflation indicates the spending pattern is fairly stable.

Table I-I

Trends in Average Expenditures by Trip Purpose All Visitors Summers 1986, 1989 and 1993 (Per Person/Per Trip)

	<—Without May Without Skagway ¹ —>			With May With Skagway
	1986	1989	1993	1993
Vacation/Pleasure	\$603	\$637	\$803	\$780
Visiting Friends/Relatives	382	399	388	419
Business and Pleasure	699	584	886	905
Business Only	446	517	424	399
Total - All Visitors	\$559	\$580	\$728	\$714

¹ Data is presented for all three summer sampling periods which do not include May or Skagway for comparative purposes.

Expenditures by Entry Mode

Total Instate Expenditures by Entry Mode

Visitors entering Alaska by Domestic Air represented 53% of all visitors and 61% (\$364 million) of total instate expenditures. Domestic Air had the largest capacity to bring visitors to the State of any entry mode, having carried 443,600 during Summer 1993. Many Domestic Air visitors exit by another mode and other entry mode visitors exit by Domestic Air. Expenditures by all users of each mode were analyzed in Expenditures by Mode Use.

Cruise Ship entries were almost 30% of all visitors and 20% of total instate expenditures. More than 12% of visitors entered by Highway, accounting for 10% of total expenditures. Three and one-half percent of visitors entered on the Alaska Marine Highway System (Ferry), contributing 6% in visitor dollars while 1.5% entered by International Air, accounting for 3% of all visitor dollars.

Domestic Air, Cruise Ship and International Air visitors spent more dollars on Tours/Recreation than any other expense category for each group. Highway and Ferry visitors spent more of their dollars on Transportation. Lodging was the second highest category for Domestic Air visitors while Gifts/Souvenirs was second highest for Cruise Ship visitors.

Graph I-D

Total Instate Expenditures by Entry Mode
Summer 1993 - All Visitors
(In Millions of Dollars)

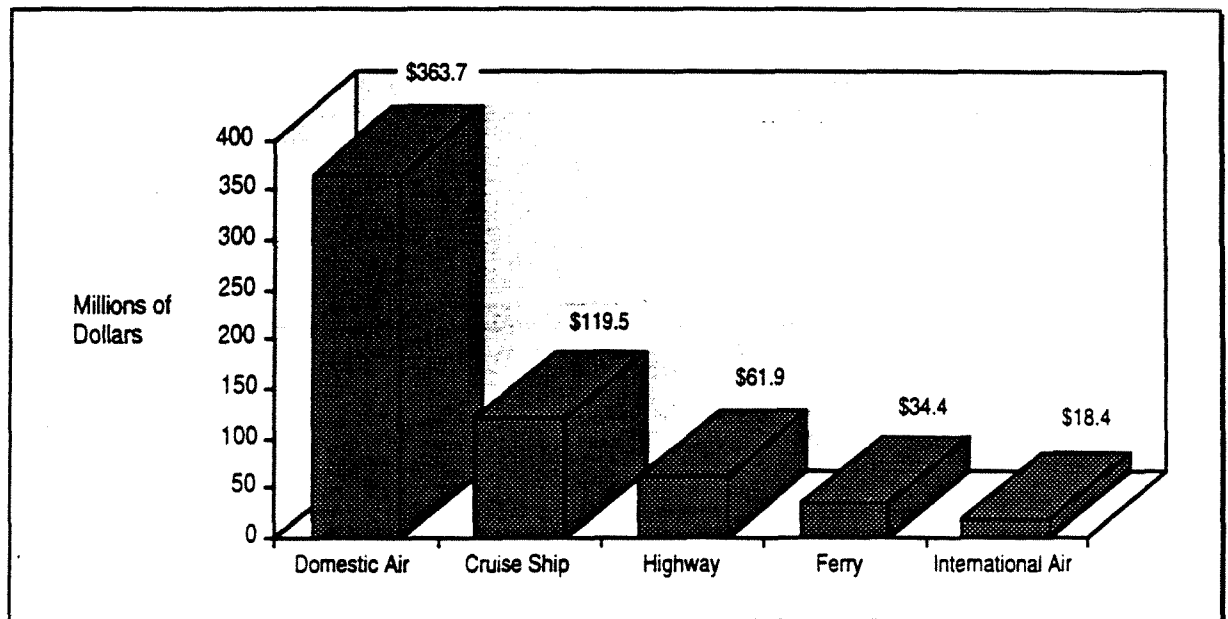


Table I-J

Total Instate Expenditures by Entry Mode
Summer 1993 - All Visitors
(In Millions of Dollars)

Expenditure Category	ENTRY MODE				
	Domestic Air	Cruise Ship	Highway ¹	Ferry	International Air
Lodging	\$78.9	\$20.7	\$7.6	\$5.2	\$3.8
Transportation	59.5	16.0	15.3	14.3	3.3
Ground Transportation	19.1	12.4	0.3	1.4	1.2
Instate Air	9.1	3.1	0.5	0.7	1.0
Rental Car/RV	23.5	0.4	<0.1	0.5	0.8
Personal Vehicle Expenses	5.9	0.2	8.9	1.4	0.2
Instate Ferry	1.7	—	5.6	10.4	0.2
Tours/Recreation	111.2	44.7	8.9	5.3	4.9
Day Tours/Salmon Bake	37.0	43.0	7.2	3.0	1.4
Overnight Instate Tours	65.3	1.0	0.1	1.6	2.0
Guide Service	1.4	—	—	—	1.1
Other Entertainment /Sports	7.5	0.6	1.6	0.7	0.3
Food/Beverage	53.0	7.4	11.3	4.4	2.4
In Eating Places	39.7	6.3	5.8	3.0	1.9
In Bars & Lounges	2.8	0.4	0.4	0.1	0.2
In Stores	10.5	0.8	5.1	1.3	0.4
Gifts/Souvenirs	38.2	24.7	8.7	3.3	2.5
Souvenir Clothing	9.9	8.2	2.7	0.9	0.4
Alaska Native Arts & Crafts	5.3	2.4	1.3	0.4	0.2
Other Alaska Made Arts & Crafts	7.5	0.9	0.4	0.5	0.2
All Other Gifts	15.6	13.2	4.2	1.5	1.7
Personal Expenses	9.0	1.3	2.1	0.6	0.6
Clothing	5.4	1.8	0.8	0.2	0.3
Business Expenses	0.3	—	<0.1	—	<0.1
Undistributed Expenses	8.2	2.9	7.4	1.1	0.6
Total Instate Expenditures	\$363.7	\$119.5	\$61.9	\$34.4	\$18.4

¹ Highway mode includes personal vehicle expenses only. Motorcoaches and trucks are not included.

Average Instate Expenditures by Entry Mode

International Air had the highest average per person per trip expenditure of the entry mode groups, followed by Ferry, Domestic Air, Highway and Cruise Ship. Visitors entering by International Air spent 26% of their average per person per trip expenditures on Tours/Recreation and nearly 40% on Lodging and Transportation.

Domestic Air and Cruise Ship visitors were most likely to spend their dollars on Tours/Recreation. Lodging and Food/Beverage were the next largest expenditure categories for Domestic Air visitors. For Cruise Ship visitors, Gifts/Souvenirs was the next largest expenditure. Although the Cruise Ship per person per trip average was the lowest of all entry mode groups, the sheer volume of cruise arrivals placed cruise entries second in total instate spending.

Ferry entries included transportation to and from the state, which accounted for a portion of the average expenditures for the Ferry category. All Ferry transportation to and from the state was considered instate spending since the Ferry system is State-owned and operated. Transportation accounted for most of the Highway visitors' dollars, followed by Food/Beverage. Almost equal amounts were spent on Gifts/Souvenirs and Tours/Recreation.

Graph I-E

**Average Instate Expenditures by Entry Mode
Summer 1993 - All Visitors
(Per Person/Per Trip)**

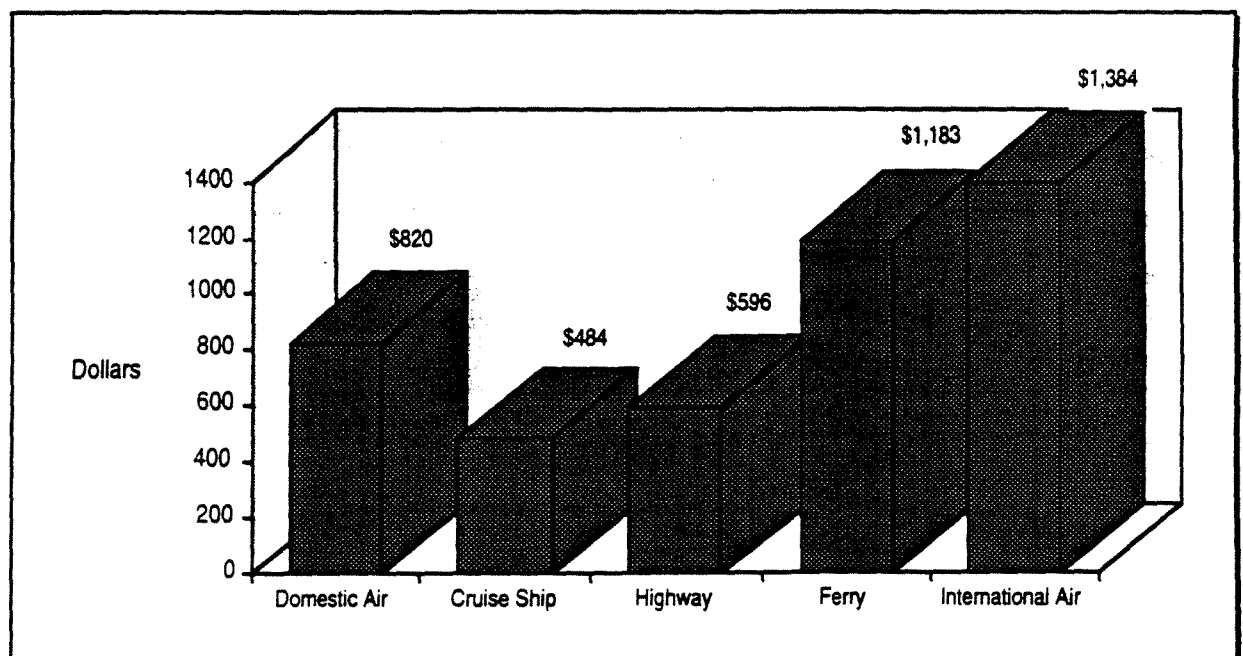


Table I-K

Average Instate Expenditures by Entry Mode
Summer 1993 - All Visitors
 (Per Person/Per Trip)

Expenditure Category	ENTRY MODE				
	Domestic Air	Cruise Ship	Highway ¹	Ferry	International Air
Lodging	\$178	\$84	\$73	\$177	\$286
Transportation	134	65	148	493	250
Ground Transportation	43	50	3	47	88
Instate Air	20	13	5	23	74
Rental Car/RV	53	2	-	16	62
Personal Vehicle Expenses	13	1	86	48	15
Instate Ferry	4	-	54	359	12
Tours/Recreation	251	181	85	181	366
Day Tours/Salmon Bake	83	174	69	104	109
Overnight Instate Tours	147	4	1	53	150
Guide Service	3	-	-	-	80
Other Entertainment /Sports	17	3	15	24	26
Food/Beverage	120	30	108	152	181
In Eating Places	90	25	56	103	141
In Bars & Lounges	6	2	4	5	12
In Stores	24	3	49	44	28
Gifts/Souvenirs	86	100	83	114	191
Souvenir Clothing	22	33	26	31	32
Alaska Native Arts & Crafts	12	10	12	15	17
Other Alaska Made Arts & Crafts	17	4	4	16	12
All Other Gifts	35	53	41	53	130
Personal Expenses	20	5	20	21	43
Clothing	12	7	7	6	22
Business Expenses	1	-	-	-	1
Undistributed Expenses	18	12	71	38	44
Total Instate Expenditures	\$820	\$484	\$596	\$1,183	\$1,384

¹ Highway mode includes personal vehicle expenses only. Motorcoaches and trucks are not included.

Trends in Total Instate Expenditures by Entry Mode

All Entry Mode categories experienced substantial growth in expenditures, ranging from 120% for Cruise Ship to 38% for Ferry between Summers 1989 and 1993.

Cruise Ship entries experienced the largest expenditure increase of 120% between Summers 1989 and 1993. Domestic Air showed a 75% increase while International Air showed a 51% increase in total instate expenditures. Ferry entries and Highway entries both increased by more than one-third.

Ferry entries for Summers 1989 and 1993 included transportation to and from the state. All Ferry transportation to and from the state was considered instate spending since the Ferry system is State-owned and operated.

Table I-L

Trends in Total Instate Expenditures by Entry Mode All Visitors Summers 1986, 1989 and 1993 (In Millions of Dollars)

Entry Mode	<—Without May Without Skagway ¹ —>			With May With Skagway 1993
	1986	1989	1993	
Domestic Air	\$185.3	\$183.5	\$320.7	\$363.7
International Air	9.0	11.3	17.1	18.4
Cruise Ship	53.1	49.8	109.5	119.5
Ferry	12.5	23.7	32.6	34.4
Highway ²	25.0	28.1	39.1	61.9
Total	\$284.9	\$296.5	\$519.1	\$597.9

¹ Data is presented for all three summer sampling periods which do not include May or Skagway for comparative purposes.
² Highway mode includes personal vehicle expenses only. Not included are Motorcoaches and trucks.

Trends in Average Instate Expenditures by Entry Mode

The overall growth for average instate expenditures by entry mode was an impressive 26%, including the overall Alaska inflation rate of 17.9%. The most significant gain in per person per trip expenditures was in International Air, which increased 86% since Summer 1989. Cruise Ship visitors spent 45% more on the average than in Summer 1989. Domestic Air's average instate expenditures increased by 26% while Ferry visitors had a 22% increase. Highway average trip expenditures decreased slightly.

Table I-M

Trends in Average Instate Expenditures by Entry Mode All Visitors Summers 1986, 1989 and 1993 (Per Person/Per Trip)

Entry Mode	←Without May Without Skagway ¹ →			With May With Skagway
	1986	1989	1993	1993
Domestic Air	\$722	\$647	\$818	\$820
International Air	841	735	1,367	1,384
Cruise Ship	325	347	504	484
Ferry	508	960	1,175	1,183
Highway ²	459	636	618	596
Total Average - All Visitors	\$559	\$580	\$728	\$714

¹ Data is presented for all three summer sampling periods which do not include May or Skagway for comparative purposes.
² Highway mode includes personal vehicle expenses only. Not included are Motorcoaches and trucks.

Expenditures by Transportation Mode Use

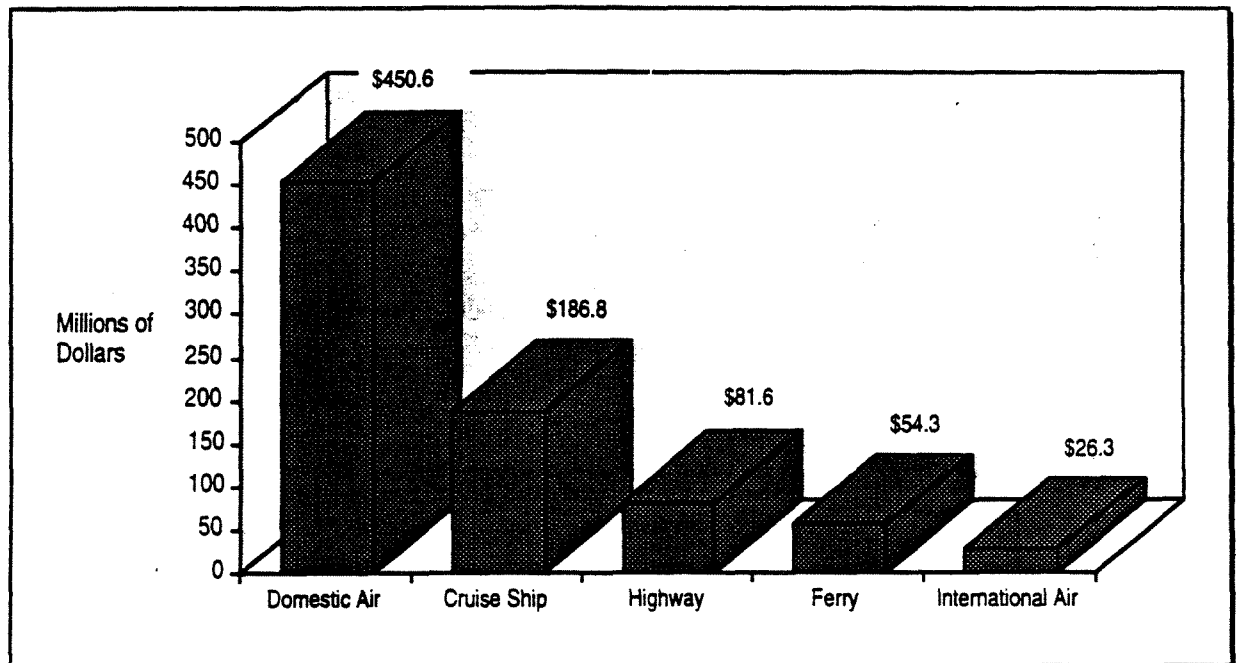
Total Instate Expenditures by Mode Use

Most visitors used the same mode for both entry into and exit from Alaska. However, nearly one-third of the visitors who entered Alaska by Cruise Ship intended to exit by Domestic Air. Rather than assigning the expenditures of these mode-switchers to one mode use group or the other, as in an analysis by entry mode, this analysis included them in both. This produced a more accurate picture of the total impact of each market.

This was an analysis of spending by the total number of visitors using each mode, whether for entry, exit or both. In other words, the spending of visitors who arrived by Cruise Ship and left by Domestic Air is reflected in the total expenditures for both modes. Therefore, the total spending for all mode use adds up to more than total visitor spending of \$598 million. This discrepancy in total spending was essential to producing an accurate and complete representation of the impact of the individual travel mode user groups.

Graph I-F

**Total Instate Expenditures by Mode Use
Summer 1993 - All Visitors
(In Millions of Dollars)**



Domestic Air dominated both directions of travel and showed the largest impact in overall spending, at 75% of total instate expenditures. Cruise Ship users were the next largest impact group accounting for almost one-third of all visitor dollars. Highway accounted for 13% of total instate expenditures, followed by Ferry and International Air, respectively.

Table I-N

**Total Instate Expenditures by Mode Use
Summer 1993 - All Visitors
(In Millions of Dollars)**

Expenditure Category	MODE USE				
	Domestic Air	Cruise Ship	Highway ¹	Ferry	International Air
Lodging	\$101.8	\$42.2	\$10.4	\$8.6	\$4.6
Transportation	78.7	30.7	22.0	21.7	4.7
Ground Transportation	32.4	24.9	0.4	2.1	1.8
Instate Air	12.2	4.9	0.8	0.7	1.5
Rental Car/RV	24.1	0.8	0.1	0.5	0.9
Personal Vehicle Expenses	6.2	0.2	10.1	2.8	0.2
Instate Ferry	3.5	-	10.6	15.6	0.3
Tours/Recreation	130.9	59.2	12.5	7.4	7.1
Day Tours/Salmon Bake	54.8	57.2	8.7	4.9	2.0
Overnight Instate Tours	66.7	1.0	1.9	1.7	3.6
Guide Service	1.4	-	-	-	1.1
Other Entertainment /Sports	8.0	1.0	1.9	0.9	0.4
Food/Beverage	60.9	13.0	13.8	7.8	3.4
In Eating Places	46.5	11.2	7.5	5.2	2.6
In Bars & Lounges	3.0	0.7	0.4	0.2	0.2
In Stores	11.3	1.1	5.8	2.4	0.7
Gifts/Souvenirs	50.8	33.3	10.5	5.6	3.3
Souvenir Clothing	13.7	10.7	3.3	1.6	0.5
Alaska Native Arts & Crafts	6.8	3.2	1.5	0.6	0.2
Other Alaska Made Arts & Crafts	8.0	2.1	0.6	0.6	0.2
All Other Gifts	22.4	17.4	5.1	2.8	2.4
Personal Expenses	10.0	1.8	2.5	0.9	0.9
Clothing	6.4	2.4	0.9	0.2	1.7
Business Expenses	0.3	-	<0.1	<0.1	<0.1
Undistributed Expenses	10.9	4.1	8.9	2.1	0.6
Total Instate Expenditures	\$450.6	\$186.8	\$81.6	\$54.3	\$26.3

¹ Highway mode includes personal vehicle expenses only. Not included are Motorcoaches and trucks.

Average Instate Expenditures by Mode Use

When analyzing the per person per trip average instate expenditure of each mode use group, the value of each mode becomes clear. Ferry and International Air users nearly tied for first place with the highest per person per trip instate expenditures. The high average for Ferry users was partly due to the inclusion of Ferry transportation to and from the state. However, the high average for International air users was influenced by the generally high expenditure levels of Overseas visitors and the much longer than average length of stay by European visitors.

Domestic Air users were third in average expenditures, followed by Highway and Cruise Ship users. Generally, analysis by mode use groups is more accurate than analysis by entry mode groups. For all mode use groups, with the exception of Ferry users, the average per person expenditure was higher than reflected by visitors entering via a particular mode.

Graph I-G

**Average Instate Expenditures by Mode Use
Summer 1993 - All Visitors
(Per Person/Per Trip)**

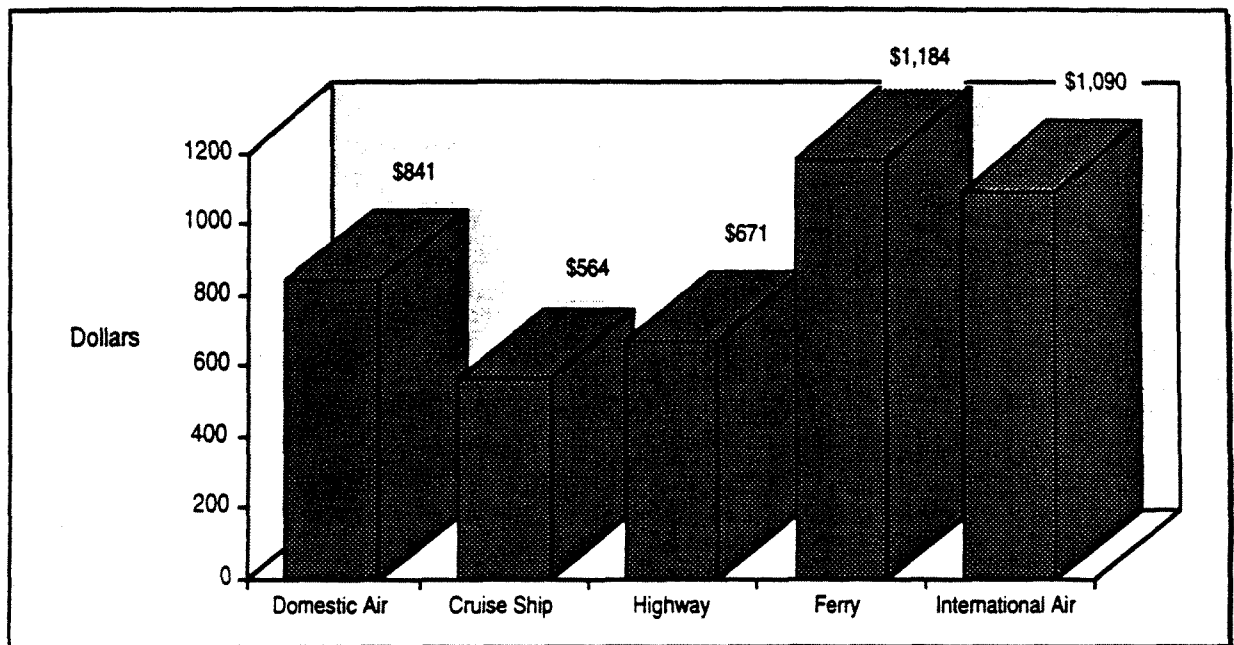


Table I-O

**Average Instate Expenditures by Mode Use
Summer 1993 - All Visitors
(Per Person/Per Trip)**

Expenditure Category	MODE USE				
	Domestic Air	Cruise Ship	Highway ¹	Ferry	International Air
Lodging	\$190	\$127	\$86	\$187	\$191
Transportation	147	93	181	473	195
Ground Transportation	61	75	4	46	73
Instate Air	23	15	6	14	61
Rental Car/RV	45	2	1	10	37
Personal Vehicle Expenses	12	1	83	60	9
Instate Ferry	6	-	87	341	11
Tours/Recreation	244	179	103	162	293
Day Tours/Salmon Bake	102	173	71	106	82
Overnight Instate Tours	125	3	15	36	149
Guide Service	3	-	-	-	44
Other Entertainment /Sports	15	3	16	20	18
Food/Beverage	114	39	113	170	142
In Eating Places	87	34	62	113	107
In Bars & Lounges	6	2	4	5	7
In Stores	21	3	48	52	28
Gifts/Souvenirs	95	101	86	122	137
Souvenir Clothing	26	32	27	34	20
Alaska Native Arts & Crafts	13	10	13	14	9
Other Alaska Made Arts & Crafts	15	6	5	13	8
All Other Gifts	42	52	42	61	101
Personal Expenses	18	6	21	19	35
Clothing	12	7	8	5	70
Business Expenses	1	-	-	-	2
Undistributed Expenses	20	12	74	47	24
Total Instate Expenditures	\$841	\$564	\$671	\$1,184	\$1,090

¹ Highway mode includes personal vehicle expenses only. Not included are Motorcoaches and trucks.

Expenditures by Travel Type

Total Instate Expenditures by Travel Type

Travel type was broken down into three groups: Package, Independent and Inde-package. Within each of these groups a further breakdown defines each type of visitor. Package visitors were grouped as Round-trip Cruise, Cruise/Tour, Cruise/Air and Other Tours. Independents and Inde-package visitors were grouped into the four trip purpose groups: Vacation/Pleasure (VP), Visiting Friends and Relatives (VFR), Business and Pleasure (BP) and Business Only (BO).

The total Independent market (Independent plus Inde-package visitors) represented 57% of all visitors and 62% of the total spending of all visitors. One-third of all spending was by Independent visitors and 29% by Inde-package visitors. Package tour visitors were the remaining 43% of all visitors and 38% of all visitor spending, with Cruise/Tour visitors contributing 21% of all visitor dollars and significantly more than any other Package group. Round-trip Cruise and Other Tours represented a large amount of spending among the Package visitors. Other Tours were generally high ticket fishing and adventure tours.

Among both Independent and Inde-package visitors, those visiting for Vacation/Pleasure spent the most. Business & Pleasure visitors spent almost equally whether Independent or Inde-package, only surpassed by VFRs who were primarily Independent. Business Only visitors were all Independents, as indicated by their spending.

Spending among the expense categories varied considerably by travel type groups as well as within each group. For instance, among Package visitors, Round-trip Cruise visitors and Cruise/Air visitors spent very little on Lodging, Transportation or Food/Beverage. Tours/Recreation was a considerable expense for each group. Transportation was the second largest expense for Cruise/Tour visitors.

The spending patterns among Independent visitors varied as well. For Vacation/Pleasure visitors, Tours/Recreation was a major expense item, with Inde-package visitors spending almost twice as much as Independent visitors. Transportation was the second largest expense for Vacation/Pleasure visitors, whether they were Independent or Inde-package. Independent VFRs spent the most on Food/Beverage whereas the Inde-package VFRs spent more on Tours/Recreation before spreading the rest of their dollars across expense categories.

Total Instate Expenditures by Travel Type
Summer 1993 - All Visitors
(In Millions of Dollars)

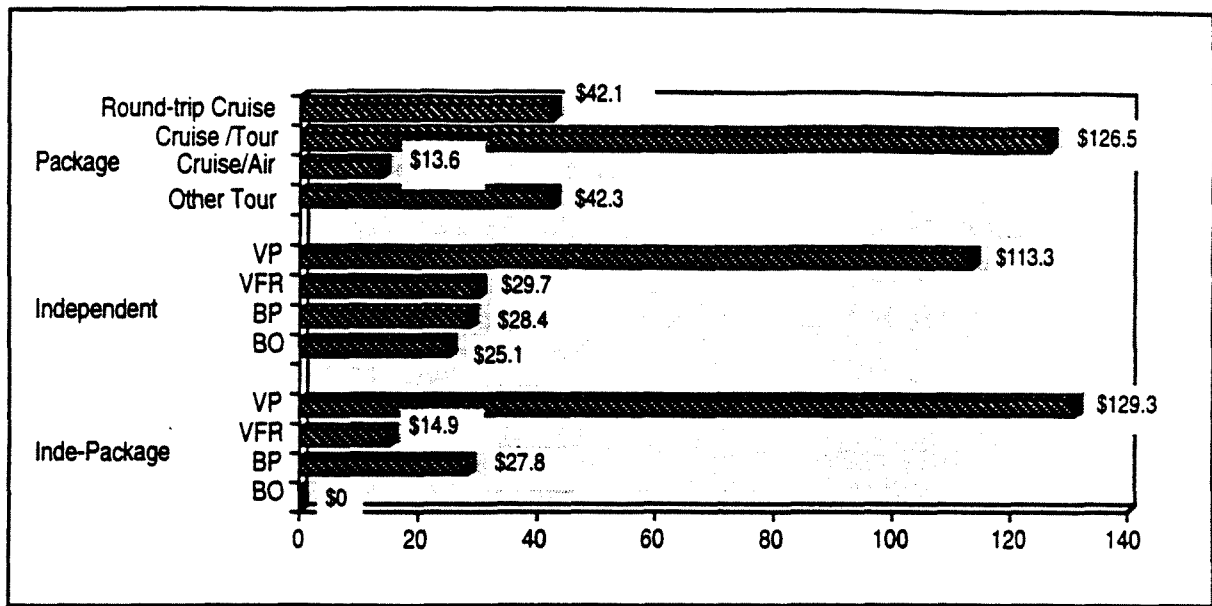


Table I-P

Total Instate Expenditures by Travel Type
Summer 1993 - Package Visitors
(In Millions of Dollars)

Expenditure Category	Round-trip Cruise	Cruise/ Tour	Cruise/Air	Other Tour
Lodging	—	\$41.0	\$1.4	\$12.7
Transportation	0.1	29.9	0.9	8.5
Ground Transportation	0.1	24.8	0.6	5.0
Instate Air	—	4.9	—	2.2
Rental Car/RV	—	0.2	0.2	0.5
Personal Vehicle Expenses	<0.1	<0.1	0.1	0.2
Instate Ferry	—	—	—	0.7
Tours/Recreation	26.3	23.7	6.6	11.0
Day Tours/Salmon Bake	26.1	23.1	5.7	6.3
Overnight Instate Tours	—	—	0.8	1.8
Guide Service	—	—	—	2.5
Other Entertainment/Sports	0.2	0.6	0.1	0.4
Food/Beverage	0.9	10.9	0.8	4.1
In Eating Places	0.4	9.7	0.7	3.6
In Bars & Lounges	0.2	0.5	<0.1	0.2
In Stores	0.3	0.7	0.1	0.3
Gifts/Souvenirs	12.9	15.9	3.0	4.1
Souvenir Clothing	4.6	4.7	0.8	1.1
Alaska Native Arts & Crafts	1.3	1.1	0.5	0.7
Other Alaska Made Arts & Crafts	0.6	1.3	0.1	0.3
All Other Gifts	6.5	8.8	1.6	2.0
Personal Expenses	0.6	1.0	0.1	0.4
Clothing	0.9	0.9	0.5	0.4
Business Expenses	—	—	—	—
Undistributed Expenses	0.4	3.1	0.4	1.1
Total Instate Expenditures	\$42.1	\$126.5	\$13.6	\$42.3

Table I-Q

**Total Instate Expenditures by Travel Type
Summer 1993 - Independent Visitors
(In Millions of Dollars)**

Expenditure Category	<-----Independent----->				<-----Inde-Package ¹ ----->			
	VP	VFR	BP	BO	VP	VFR	BP	BO
Lodging	\$17.1	\$2.8	\$9.3	\$10.5	\$13.3	\$1.0	\$6.9	-
Transportation	21.9	4.6	4.1	4.6	25.5	2.0	6.1	-
Ground Transportation	1.2	0.3	<0.1	0.3	1.3	0.4	0.2	-
Instate Air	2.0	0.5	1.3	1.1	1.7	0.5	-	-
Rental Car/RV	9.0	1.5	2.0	2.9	2.9	0.5	5.4	-
Personal Vehicle Expenses	5.6	1.3	0.7	0.3	8.0	0.2	0.2	-
Instate Ferry	3.9	0.9	0.1	-	11.6	0.4	0.3	-
Tours/Recreation	29.7	3.8	3.4	0.1	55.6	4.9	6.7	-
Day Tours/Salmon Bakes	9.8	1.4	0.8	0.1	13.4	2.2	2.5	-
Overnight Instate Tours	16.3	1.1	1.5	-	39.7	2.2	4.0	-
Guide Service	-	-	-	-	-	-	-	-
Other Entertainment/Sports	3.6	1.3	1.1	0.1	2.5	0.5	0.2	-
Food/Beverage	17.9	8.6	6.7	6.3	15.6	2.5	3.8	-
In Eating Places	11.5	5.6	4.9	5.0	10.1	1.9	2.9	-
In Bars & Lounges	1.1	0.2	0.5	0.4	0.4	0.1	0.1	-
In Stores	5.3	2.8	1.3	0.9	5.0	0.5	0.8	-
Gifts/Souvenirs	15.0	5.8	2.2	1.7	11.9	2.2	1.8	-
Souvenir Clothing	2.9	1.8	1.1	0.4	3.4	0.9	0.3	-
Alaska Native Arts & Crafts	2.6	0.9	0.5	0.1	1.5	0.1	0.3	-
Other Alaska Made Arts & Crafts	3.9	0.6	0.1	0.1	1.6	0.2	0.1	-
All Other Gifts	5.5	2.4	0.5	1.2	5.4	1.0	1.2	-
Personal Expenses	3.2	1.7	1.5	1.4	2.1	0.5	1.0	-
Clothing	2.5	0.8	0.9	<0.1	0.8	0.2	0.4	-
Business Expenses	<0.1	0.1	0.2	<0.1	<0.1	-	-	-
Undistributed Expenses	5.9	1.5	0.1	0.4	4.5	1.5	1.2	-
Total Instate Expenditures	\$113.3	\$29.7	\$28.4	\$25.1	\$129.3	\$14.9	\$27.8	-

¹ Inde-Package visitors are independents who plan to purchase sightseeing tours during their trip.

Average Instate Expenditures by Travel Type

A closer examination of travel type categories by average per person per trip expenditures demonstrated the value of each travel type visitor. The per person per trip average varied widely among Package tour visitors. Cruise/Tour and Other Tours had the highest per person per trip expenditures for Package tour visitors, averaging \$1,145 and \$1,031, respectively. Round-trip Cruise and Cruise/Air were not only the lowest among Package visitors but were also the two lowest in per person per trip instate expenditures, averaging \$255 and \$325, respectively.

Independents generally spent less than the average visitor. Vacation/Pleasure Independents spent more than other Independent trip purpose groups, an average of \$827 per person per trip, significantly more than the overall Independent average of \$594. Independent VFRs spent the least of the Independents.

Inde-package VPs and BPs spent well above the overall per person per trip average. Expense category breakouts showed the Inde-package VPs spent most heavily on Tours/Recreation, followed by Transportation and Food/Beverage. On the other hand, Inde-package BPs spent almost equally between Lodging, Tours/ Recreation and Transportation. The Inde-package VFRs spent most heavily on Tours/Recreation followed by Food/Beverage.

Graph I-1

**Average Instate Expenditures by Travel Type
Summer 1993 - All Visitors
(Per Person/Per Trip)**

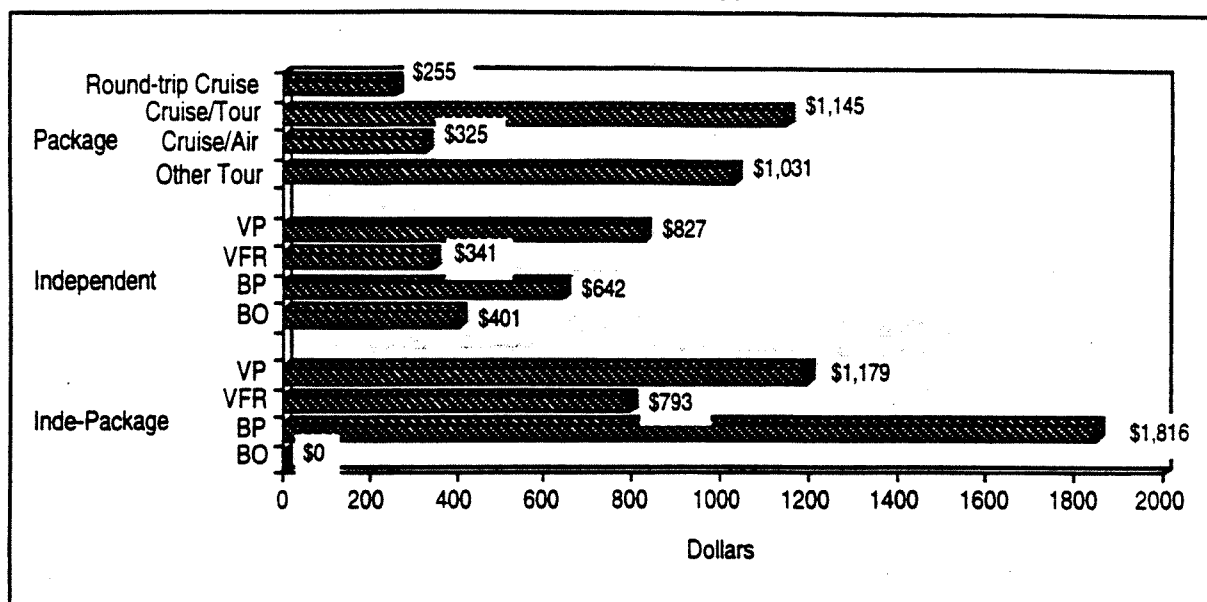


Table I-R

**Average Instate Expenditures by Travel Type
Summer 1993 - Package Visitors
(Per Person/Per Trip)**

Expenditure Category	Round-trip Cruise	Cruise/ Tour	Cruise/Air	Other Tour
Lodging	—	\$371	\$33	\$309
Transportation	—	271	21	208
Ground Transportation	—	225	14	122
Instate Air	—	44	—	55
Rental Car/RV	—	1	5	12
Personal Vehicle Expenses	—	—	2	4
Instate Ferry	—	—	—	16
Tours/Recreation	159	215	159	268
Day Tours/Salmon Bake	158	209	136	154
Overnight Instate Tours	—	—	20	44
Guide Service	—	—	—	61
Other Entertainment/Sports	1	6	2	10
Food/Beverage	5	98	19	100
In Eating Places	3	88	17	87
In Bars & Lounges	1	4	1	5
In Stores	2	6	1	8
Gifts/Souvenirs	79	144	72	99
Souvenir Clothing	28	43	19	28
Alaska Native Arts & Crafts	8	10	13	17
Other Alaska Made Arts & Crafts	4	12	2	6
All Other Gifts	39	80	38	48
Personal Expenses	4	9	2	11
Clothing	6	8	11	9
Business Expenses	—	—	—	—
Undistributed Expenses	3	28	8	27
Total Instate Expenditures	\$255	\$1,145	\$325	\$1,031

Table I-S

**Average Instate Expenditures by Travel Type
Summer 1993 - Independent Visitors
(Per Person/Per Trip)**

Expenditure Category	Independent				Inde-Package ¹			
	VP	VFR	BP	BO	VP	VFR	BP	BO ²
Lodging	\$125	\$33	\$210	\$168	\$121	\$52	\$448	\$-
Transportation	160	52	93	73	233	108	400	-
Ground Transportation	9	4	1	5	11	23	15	-
Instate Air	15	6	29	17	16	29	-	-
Rental Car/RV	66	18	46	46	26	24	354	-
Personal Vehicle Expenses	41	14	16	5	73	9	13	-
Instate Ferry	29	11	1	-	106	23	19	-
Tours/Recreation	217	45	78	2	507	262	435	-
Day Tours/Salmon Bakes	71	16	19	1	122	118	163	-
Overnight Instate Tours	119	13	33	-	362	116	261	-
Guide Service	-	-	-	-	-	-	-	-
Other Entertainment/Sports	26	15	26	1	23	27	11	-
Food/Beverage	131	99	152	101	142	134	246	-
In Eating Places	84	64	111	80	92	103	190	-
In Bars & Lounges	8	2	12	7	4	3	5	-
In Stores	39	33	29	14	46	28	50	-
Gifts/Souvenirs	110	66	50	28	108	117	117	-
Souvenir Clothing	21	21	25	6	31	45	18	-
Alaska Native Arts & Crafts	19	10	11	1	14	4	16	-
Other Alaska Made Arts & Crafts	28	7	2	1	15	12	6	-
All Other Gifts	40	28	11	19	49	55	77	-
Personal Expenses	23	19	35	23	19	27	64	-
Clothing	18	9	20	-	8	12	25	-
Business Expenses	-	1	5	1	-	-	-	-
Undistributed Expenses	43	17	1	6	41	82	80	-
Total Instate Expenditures	\$827	\$341	\$642	\$401	\$1,179	\$793	\$1,816	\$-

¹ Inde-package visitors are independents who plan to purchase sightseeing tours during their trip.
² Among inde-package visitors there were no Business Only visitors or expenditures.

Expenditures by Origin

Total Instate Expenditures by Origin

The majority of the visitors to Alaska, 83%, were from the United States during Summer 1993 and were responsible for 87% of all visitor dollars. Overseas visitors were 6% of all visitors and brought in 9% of total instate expenditures. Canada accounted for 10% of all visitors to Alaska but only 3% of all visitor dollars.

In the United States, the top producing states were in the West (California and Washington) and in the South (Texas and Florida). More than one-third (37%) of Alaska's summer visitors were from the West, spending a total of \$167 million, 28% of all visitor dollars. The South, Midwest and East accounted for 47% of all visitors and together accounted for nearly 60% of all instate expenditures. California remained an important contributor to total instate expenditures, having brought \$63 million into the state, 11% of all visitor dollars.

For all visitors from the United States, Tours/Recreation were a major expenditure, accounting for \$154 million, or 30% of total instate expenditures by U. S. citizens. Lodging and Transportation accounted for 20% and 18% of all U.S. visitor dollars. Almost equal amounts were spent on Food/Beverage and Gifts/Souvenirs by visitors from the United States.

Canadians were not big spenders in Alaska, with only 3% of the visitor dollars spent by nearly 10% of all visitors. However, Visitors from Overseas locations spent fairly well, with \$55 million or 9% of all visitor dollars. European visitors accounted for most of the Overseas visitors and 5% of total instate expenditures. Two percent of all visitors came from the Pacific Region and brought \$24 million or 4% of total instate expenditures. Visitors from Japan and Australia/New Zealand spent almost equal amounts.

Of the \$20 million spent by Canadian visitors, half went to Tours/Recreation and Transportation. European visitors spent nearly half of their dollars on Tours/Recreation and Transportation as well. Pacific Region visitors spent more than half of their instate expenditures on Tours/Recreation and Lodging.

Graph I-J

**Total Instate Expenditures by Origin
Summer 1993 - All Visitors
(In Millions of Dollars)**

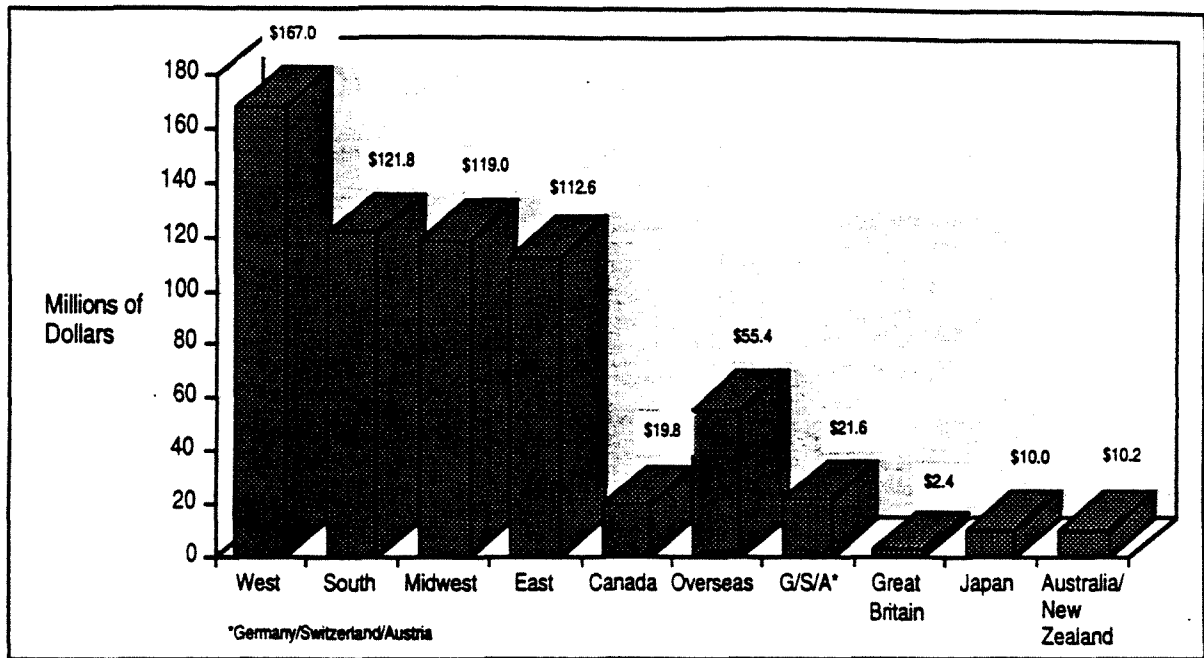


Table I-T

Total Instate Expenditures by U.S. Origin
Summer 1993 - All Visitors
(In Millions of Dollars)

Expenditure Category	West			South			Mid-west	East
	Total	CA	WA	Total	FLA	TEX		
Lodging	\$32.0	\$14.2	\$9.0	\$26.0	\$5.0	\$5.6	\$24.8	\$20.3
Transportation	27.3	10.5	6.3	20.5	4.8	4.0	25.1	19.6
Ground Transportation	4.8	2.3	0.5	7.8	1.4	1.2	10.5	7.5
Instate Air	4.2	1.8	1.0	2.6	0.9	0.8	3.5	1.7
Rental Car/RV	5.8	1.3	2.8	4.5	1.0	1.0	3.4	7.6
Personal Vehicle Expenses	4.9	1.5	0.8	3.3	0.9	0.9	4.7	1.1
Instate Ferry	7.4	3.7	1.0	2.2	0.8	0.2	2.9	1.7
Tours/Recreation	48.8	18.1	9.2	37.2	6.4	14.4	30.2	37.4
Day Tours/Salmon Bakes	22.5	11.6	2.2	23.6	5.6	4.8	18.9	14.2
Overnight Instate Tours	23.1	5.5	6.3	12.0	0.5	9.0	8.8	20.5
Guide Service	-	-	-	-	-	-	-	0.8
Other Entertainment/Sports	3.3	1.1	0.6	1.6	0.2	0.6	2.6	1.8
Food/Beverage	26.8	7.5	8.6	15.3	2.8	3.4	15.8	10.6
In Eating Places	18.9	5.6	6.1	11.8	2.1	2.2	10.8	8.8
In Bars & Lounges	1.3	0.4	0.5	0.7	0.1	0.4	0.9	0.3
In Stores	6.6	1.6	2.0	2.8	0.6	0.8	4.1	1.5
Gifts/Souvenirs	17.8	7.8	3.8	16.5	4.3	3.0	16.4	16.4
Souvenir Clothing	5.3	2.4	0.9	3.8	0.8	0.9	5.8	4.6
Alaska Native Arts & Crafts	2.7	1.2	0.4	2.0	0.2	0.1	1.9	1.4
Other Alaska Made Arts & Crafts	1.3	0.4	0.2	2.4	1.2	0.4	1.2	4.1
All Other Gifts	8.5	3.8	2.3	8.3	2.1	1.6	7.6	6.3
Personal Expenses	5.4	1.0	2.2	1.7	0.2	0.5	2.5	2.4
Clothing	1.5	0.6	0.3	1.2	0.2	0.5	0.9	2.0
Business Expenses	0.2	<0.1	<0.1	-	-	-	<0.1	0.1
Undistributed Expenses	7.1	3.1	0.8	3.5	1.8	1.1	3.2	3.8
Total Instate Expenditures	\$167.0	\$62.9	\$40.1	\$121.8	\$25.5	\$32.5	\$119.0	\$112.6

Table I-U

Total Instate Expenditures by Foreign Origin
Summer 1993 - All Visitors
(In Millions of Dollars)

Expenditure Category	Canada	Over-seas	← Europe →			← Pacific Region →		
			Total	G/S/A ¹	Great Britain	Total	Japan	Australia/New Zealand
Lodging	\$2.4	\$10.1	\$4.2	\$2.8	\$0.3	\$5.6	\$2.3	\$2.7
Transportation	4.4	11.3	7.4	6.6	0.3	3.7	1.7	1.5
Ground Transportation	0.3	3.4	0.9	0.8	0.1	2.3	1.1	1.1
Instate Air	0.2	1.9	0.9	0.9	-	1.0	0.5	0.2
Rental Car/RV	0.1	3.7	3.5	3.5	-	0.2	0.2	<0.1
Personal Vehicle Expenses	1.5	1.0	0.9	0.7	<0.1	<0.1	<0.1	<0.1
Instate Ferry	2.4	1.2	1.1	0.7	0.2	0.1	-	0.1
Tours/Recreation	5.6	14.6	7.3	5.6	1.1	6.7	2.6	3.9
Day Tours/Salmon Bake	4.8	7.5	2.8	1.3	1.0	4.1	1.2	2.8
Overnight Instate Tours	-	5.6	3.3	3.2	0.1	2.3	1.2	1.0
Guide Service	0.6	0.3	0.2	0.2	-	0.1	0.1	-
Other Entertainment/Sports	0.2	1.1	1.0	0.9	<0.1	0.2	0.1	<0.1
Food/Beverage	2.8	7.1	4.0	3.0	0.2	2.6	1.1	1.3
In Eating Places	1.4	4.8	2.1	1.4	0.2	2.3	1.0	1.1
In Bars & Lounges	0.3	0.4	0.2	0.2	<0.1	0.2	<0.1	0.2
In Stores	1.1	1.9	1.7	1.5	<0.1	0.2	0.1	<0.1
Gifts/Souvenirs	3.0	7.1	2.4	1.6	0.4	3.3	1.8	0.8
Souvenir Clothing	1.2	1.3	0.5	0.3	0.1	0.5	0.4	0.1
Alaska Native Arts & Crafts	0.3	1.4	0.5	0.2	<0.1	0.5	0.4	<0.1
Other Alaska Made Arts & Crafts	0.1	0.3	0.2	0.2	0.1	0.1	0.1	<0.1
All Other Gifts	1.4	4.1	1.2	0.9	0.2	2.2	1.0	0.7
Personal Expenses	0.4	1.3	0.6	0.5	<0.1	0.5	0.2	<0.1
Clothing	0.3	2.4	1.1	1.1	<0.1	1.0	0.2	<0.1
Business Expenses	-	<0.1	<0.1	-	-	-	-	-
Undistributed Expenses	0.9	1.5	1.3	0.4	-	0.2	0.1	-
Total Instate Expenditures	\$19.8	\$55.4	\$28.1	\$21.6	\$2.4	\$23.5	\$10.0	\$10.2

¹ Germany/Switzerland/Austria

Average Instate Expenditures by Origin

A closer look at per person per trip average expenditures by origin pointed out dramatic differences in expenditure patterns among the various origin groups. Overseas visitors in general spent more on average than any other visitor group, with visitors from Japan spending the most. Canadians and visitors from Great Britain spent less, on average, than most.

Among U. S. visitors, those from the East had the highest per person per trip average, and tended to stay slightly longer than the average Alaska visitor. Visitors from the West had the lowest per person average, probably influenced by the large number of business travelers from this region. (Business Only visitors tended to spend well below the overall average, while Business and Pleasure visitors tended to spend above the overall average.) Per person spending among Southern and Eastern visitors was right around the overall visitor average of \$714.

Overseas visitors were heavy spenders, particularly those from Japan, Australia and Germany/Switzerland/Austria. Visitors from Japan spent more than twice the overall per person per trip average of \$714, yet had the shortest intended stay. Visitors from Great Britain spent the least yet had longer than average stays.

Graph I-K

**Average Instate Expenditures by Origin
Summer 1993 - All Visitors
(Per Person/Per Trip)**

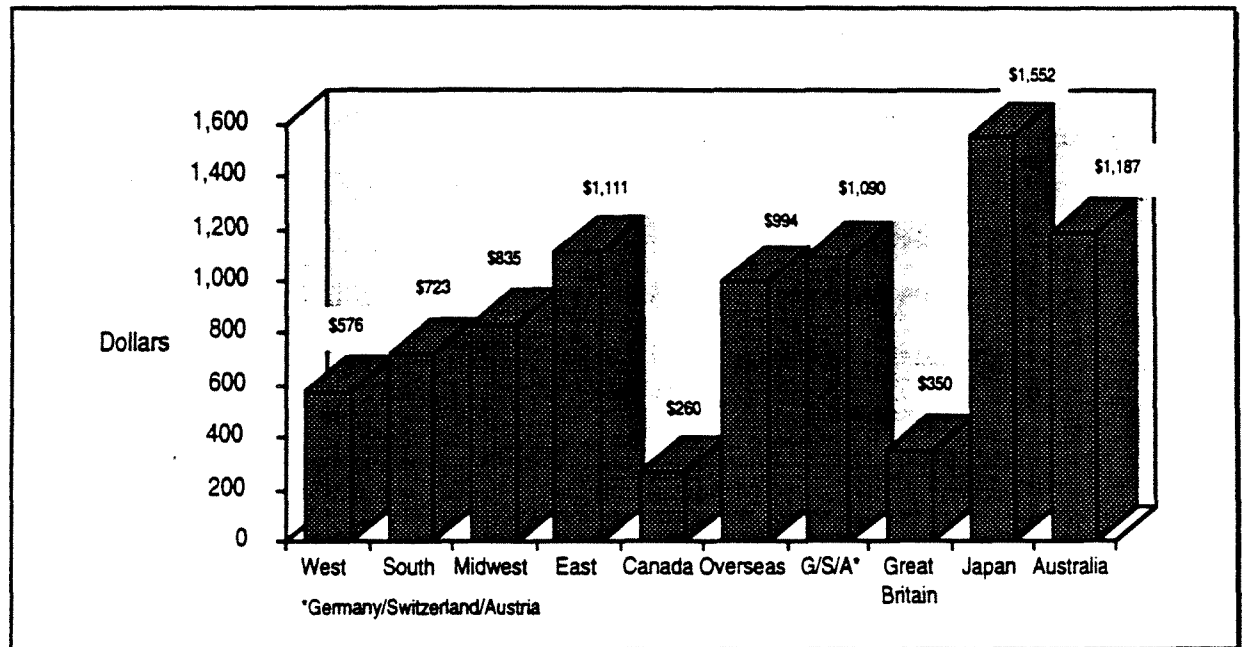


Table I-V

Average Instate Expenditures by U.S. Origin
Summer 1993 - All Visitors
 (Per Person/Per Trip)

Expenditure Category	West			South			Mid-west	East
	Total	CA	WA	Total	FLA	TEX		
Lodging	\$111	\$136	\$106	\$154	\$134	\$145	\$174	\$200
Transportation	\$94	\$101	\$73	\$121	\$131	\$102	\$176	\$193
Ground Transportation	17	22	6	46	37	30	74	74
Instate Air	15	18	12	15	24	20	24	17
Rental Car/RV	20	12	33	27	26	25	24	75
Personal Vehicle Expenses	17	14	10	20	24	22	33	11
Instate Ferry	26	35	12	13	20	6	20	17
Tours/Recreation	\$169	\$174	\$108	\$221	\$172	\$371	\$212	\$369
Day Tours/Salmon Bakes	78	111	26	140	151	123	133	140
Overnight Instate Tours	80	52	75	71	14	233	61	203
Guide Service	-	-	-	-	-	-	-	8
Other Entertainment/Sports	11	10	7	9	6	15	18	18
Food/Beverage	\$92	\$72	\$101	\$91	\$75	\$87	\$111	\$105
In Eating Places	65	53	71	70	57	58	76	87
In Bars & Lounges	4	4	6	4	2	10	6	3
In Stores	23	15	24	16	16	20	29	15
Gifts/Souvenirs	\$61	\$75	\$44	\$98	\$116	\$78	\$115	\$161
Souvenir Clothing	18	23	11	23	22	24	41	45
Alaska Native Arts & Crafts	9	12	5	12	5	4	13	14
Other Alaska Made Arts & Crafts	4	4	2	14	33	9	9	40
All Other Gifts	29	36	27	49	56	42	53	62
Personal Expenses	\$18	\$9	\$25	\$10	\$5	\$14	\$18	\$23
Clothing	\$5	\$6	\$4	\$7	\$5	\$14	\$7	\$20
Business Expenses	\$1	-	-	-	-	-	-	\$1
Undistributed Expenses	\$25	\$30	\$9	\$20	\$49	\$27	\$22	\$38
Total Instate Expenditures	\$576	\$603	\$471	\$723	\$687	\$840	\$835	\$1,111

Table I-W

Average Instate Expenditures by Foreign Origin
Summer 1993 - All Visitors
(Per Person/Per Trip)

Expenditure Category	Canada	Over-seas	← Europe →			← Pacific Region →		
			Total	G/S/A ¹	Great Britain	Total	Japan	Australia/New Zealand
Lodging	\$31	\$182	\$132	\$142	\$47	\$298	\$361	\$314
Transportation	58	203	233	332	41	195	262	176
Ground Transportation	4	62	28	39	14	121	164	133
Instate Air	3	35	28	44	—	55	72	21
Rental Car/RV	1	66	109	174	—	10	24	5
Personal Vehicle Expenses	19	18	30	36	2	2	2	2
Instate Ferry	31	22	34	34	24	7	—	15
Tours/Recreation	74	261	231	281	165	355	398	449
Day Tours/Salmon Bake	63	135	89	64	155	220	181	327
Overnight Instate Tours	—	100	104	162	10	121	190	116
Guide Service	8	6	7	11	—	5	15	—
Other Entertainment/Sports	3	20	30	44	1	8	13	6
Food/Beverage	36	127	125	152	34	140	177	148
In Eating Places	18	85	66	70	27	120	154	124
In Bars & Lounges	4	7	7	8	—	10	3	20
In Stores	14	34	52	75	6	10	19	4
Gifts/Souvenirs	39	127	76	80	56	178	282	95
Souvenir Clothing	16	23	16	16	13	28	59	14
Alaska Native Arts & Crafts	4	25	15	12	4	28	62	—
Other Alaska Made Arts & Crafts	1	6	7	8	9	5	13	2
All Other Gifts	18	73	38	43	30	116	148	79
Personal Expenses	5	23	19	26	7	27	24	2
Clothing	5	43	35	55	1	51	36	2
Business Expenses	—	—	—	—	—	—	—	—
Undistributed Expenses	12	27	39	22	—	8	11	—
Total Instate Expenditures	\$260	\$994	\$889	\$1,090	\$350	\$1,251	\$1,552	\$1,187

¹ Germany/Switzerland/Austria

Trends in Total Instate Expenditures by Origin

Since 1986, two trends have emerged in spending by origin. The first is the smaller proportion of spending by visitors from the West, from 41% in Summer 1986 to 27% in Summer 1993. However, the proportion of spending by visitors from the remaining regions of the United States remained similar to previously sampled years. The decrease in the proportion of spending by Southern visitors between Summer 1989 and Summer 1993, was offset by the dramatic increase in spending by Eastern visitors. The result was an almost even distribution of visitor dollars from the South, Midwest and East.

The second trend to emerge is the continued increasing share of the Overseas market. The number of visitors from overseas has increased 57% and overseas spending has increased more than five fold. Although overseas visitor numbers are still small, this market has developed a value nearly equal to the total visitors from California.

Table I-X

Trends in Total Instate Expenditures by Origin All Visitors Summers 1986, 1989 and 1993 (In Millions of Dollars - % of Total Spending)

	<-----Without May Without Skagway¹----->						With May With Skagway	
	1986		1989		1993		1993	
U.S. Total	\$259.2	91 %	\$262.7	89 %	\$448.4	86 %	\$520.4	87 %
West	117.6	41	97.2	33	140.5	27	167.0	28
California	48.6	17	43.7	15	51.7	10	62.9	11
Washington	25.4	9	19.4	7	34.9	7	40.1	7
South	55.7	20	84.9	29	111.9	22	121.8	20
Midwest	57.2	20	55.8	19	99.0	19	119.0	20
East	28.7	10	24.9	8	97.0	19	112.6	19
Canada Total	14.4	5	8.6	3	14.8	3	19.8	3
Overseas Total	10.2	4	24.0	8	53.6	10	55.4	9
Total	\$284.9	100 %	\$296.5	100 %	\$519.1	100 %	\$597.9	100 %

¹ Data is presented for all three summer sampling periods which do not include May or Skagway for comparative purposes.

Chapter II: Expenditures by Alaska Region

Expenditures of All Visitors

Expenditures by Visitor Type

Expenditures by Mode Use Group

Expenditures by Community

Introduction

This chapter focuses on visitor expenditures in the five major regions of Alaska – Southeast, Southcentral, Interior/North, Southwest and Denali/McKinley. Expenditures for the Alaska Marine Highway System, (State Ferry) and undistributed expenses are also included and featured separately.

Regional expenditures are analyzed by trip purpose, entry mode, origin, travel type and transportation mode use groups. Community expenditures are presented in total at the end of the chapter for 29 communities and 11 geographic locations.

Expenditures by All Visitors

Total Instate Expenditures by Region

Southcentral Alaska captured more visitor spending than all other regions of the state, accounting for 42% or \$251 million of the statewide total of \$598 million. The communities of Anchorage, Kenai/Soldotna, Homer and Seward primarily experienced the bulk of Southcentral visitor spending.

Southeast Alaska and the Interior/North region captured the next largest sums at 26% or \$152 million, and 13% or \$79 million, respectively. Southwest Alaska received \$24 million of total visitor spending, of which a significant portion can be attributed to fishing enthusiasts purchasing high-end guided resort experiences in the more remote wilderness areas of Southwest Alaska. Undistributed expenses, which refer to expenses with no category or geographic identity, totaled \$32 million. State Ferry System spending totaled \$20 million or 3% of total visitor expenditures.

Southeast visitors primarily spent on Tours/Recreation and Gifts/Souvenirs, largely a result of the continued growth of cruise ship traffic. Visitors to the Southcentral and Interior/North regions primarily spent on Lodging, Transportation and Food/Beverage, although one-quarter (22%) of Southcentral visitor spending went to Tours/Recreation. Most spending among visitors to Denali/McKinley went to Tours/Recreation, Transportation and Lodging.

Graph II-A

**Total Instate Expenditures by Region
Summer 1993 -All Visitors
(Millions of Dollars)**

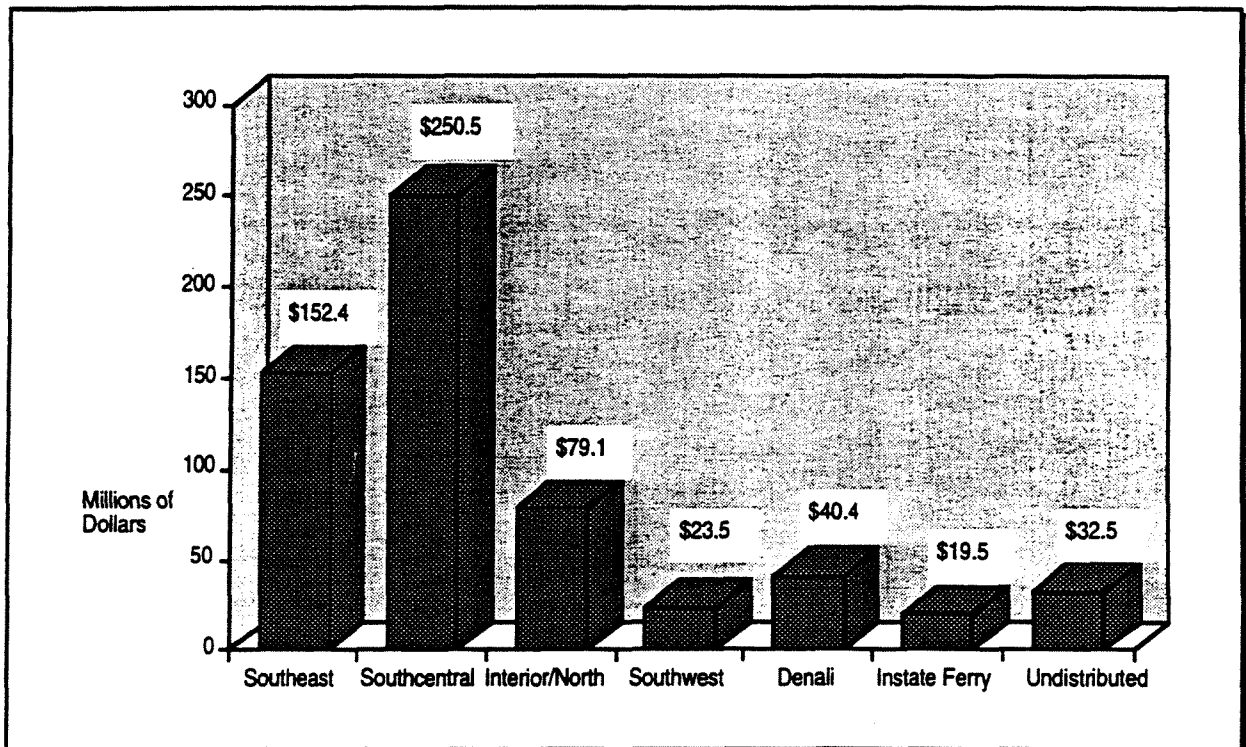


Table II-A

Total Instate Expenditures by Region
Summer 1993 - All Visitors
(In Millions of Dollars)

Expenditure Category	South-east	South-central	Interior/North	South-west	Denali/McKinley	Instate Ferry
Lodging	\$13.4	\$65.2	\$24.4	\$1.7	\$10.9	\$0.7
Transportation	8.8	46.8	18.4	6.7	10.3	17.4
Ground Transportation	3.4	12.7	8.3	<0.1	10.0	-
Instate Air	2.4	5.6	4.5	1.8	-	-
Rental Car/RV	1.0	18.4	0.9	4.8	-	-
Personal Vehicle Expenses	1.6	9.8	4.8	0.1	0.3	-
Instate Ferry	0.2	0.3	-	-	-	17.4
Tours/Recreation	73.9	55.8	8.8	11.5	12.0	-
Day Tours/Salmon Bake	50.4	26.2	6.3	0.7	8.0	-
Overnight Instate Tours	21.1	21.5	1.5	9.6	3.5	-
Guide Service	0.6	0.9	-	1.0	-	-
Other Entertainment/Sports	1.7	7.2	1.1	0.2	0.5	-
Food/Beverage	13.2	44.7	13.9	1.5	3.8	1.3
In Eating Places	9.4	31.8	9.9	0.9	3.4	1.2
In Bars & Lounges	1.0	2.0	0.7	<0.1	<0.1	0.1
In Stores	2.8	10.9	3.3	0.6	0.3	<0.1
Gifts/Souvenirs	37.4	24.9	11.2	0.7	3.1	0.1
Souvenir Clothing	10.7	7.8	2.7	<0.1	0.9	<0.1
Alaska Native Arts & Crafts	4.0	3.5	1.9	0.1	0.2	-
Other Alaska Made Arts & Crafts	6.0	1.5	1.6	<0.1	0.3	<0.1
All Other Gifts	16.7	12.1	5.1	0.6	1.7	0.1
Personal Expenses	3.0	7.4	1.6	1.3	0.2	0.1
Clothing	2.2	5.6	0.5	<0.1	0.1	-
Business Expenses	-	0.1	0.2	-	<0.1	-
Total Instate Expenditures	\$152.4	\$250.5	\$79.1	\$23.5	\$40.4	\$19.5

Average Instate Expenditures by Region

Southwest Alaska captured the largest portion of per person visitor spending, primarily in the form of Tours/Recreation, which included overnight tours such as sport fishing packages. On the low end of the scale, Denali/McKinley visitors spent the least amount per person, an average of \$163.

Southcentral visitors spent an average of \$451 per person per trip in the region, significantly less than Southwest visitors (\$839), but more than all remaining regions. Anchorage, the State's economic and tourism hub, was the primary beneficiary of visitor spending in Southcentral Alaska.

Visitors spent \$324 per person per trip in Southeast Alaska, making it the third largest region to benefit from visitor spending and surpassing the Interior/North region which ranked third in Summer 1989. Visitor spending in Southeast can be attributed, in part, to the continued growth and popularity of the Inside Passage as a cruise destination.

The Interior/North region of the state drew an average of \$261 from individual spenders to the region, of which seven in ten dollars were spent in Fairbanks. The Interior/North region drew many long-stay Independents via highway and was a popular overnight stay for people on a package tour.

Average per person per trip expenditures aboard the State Ferry were \$304, nearly all of which was spent on Transportation expenses.

Graph II-B

**Average Instate Expenditures by Region
Summer 1993 - All Visitors
(Per Person/Per Trip)**

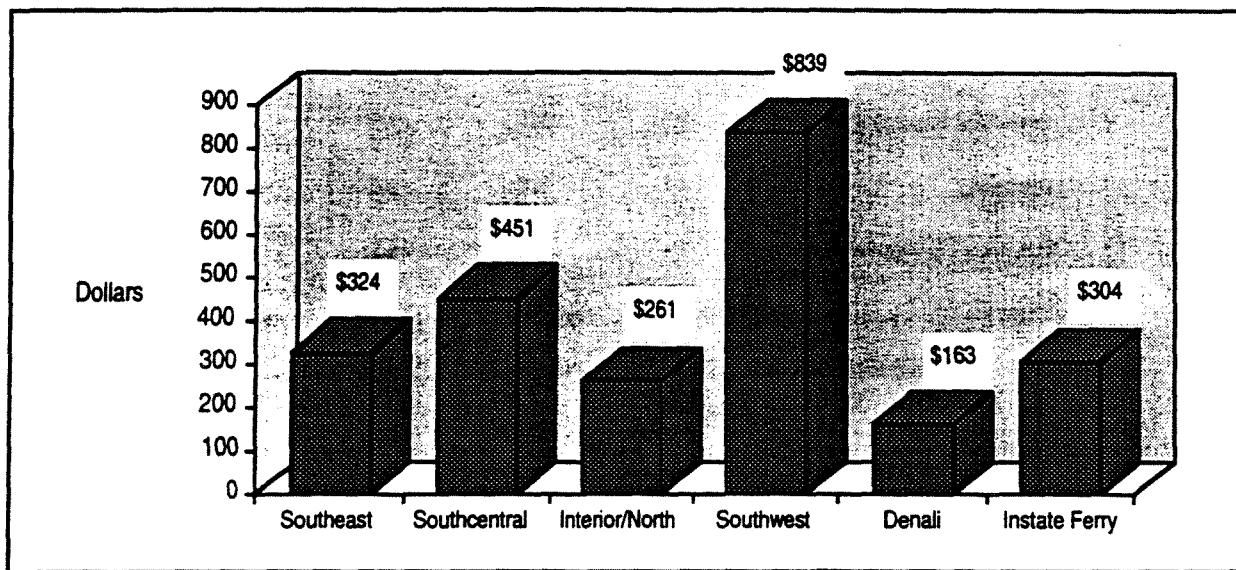


Table II-B

**Average Instate Expenditures by Region
Summer 1993 - All Visitors
(Per Person/Per Trip)**

Expenditure Category	South-east	South-central	Interior/North	South-west	Denali/McKinley	Instate Ferry
Lodging	\$28	\$117	\$80	\$61	\$44	\$11
Transportation	19	84	61	240	41	271
Ground Transportation	7	23	27	1	40	-
Instate Air	5	10	15	65	-	-
Rental Car/RV	2	33	3	173	-	-
Personal Vehicle Expenses	3	18	16	2	1	-
Instate Ferry	-	1	-	-	-	271
Tours/Recreation	157	101	29	410	48	-
Day Tours/Salmon Bake	107	47	21	26	32	-
Overnight Instate Tours	45	39	5	343	14	-
Guide Service	1	2	-	35	-	-
Other Entertainment/Sports	4	13	3	6	2	-
Food/Beverage	28	80	46	55	15	20
In Eating Places	20	57	33	31	14	19
In Bars & Lounges	2	4	2	2	-	1
In Stores	6	20	11	23	1	-
Gifts/Souvenirs	80	45	37	26	13	1
Souvenir Clothing	23	14	9	1	4	-
Alaska Native Arts & Crafts	9	6	6	2	1	-
Other Alaska Made Arts & Crafts	13	3	5	-	1	-
All Other Gifts	35	22	17	23	7	1
Personal Expenses	6	13	5	48	1	1
Clothing	5	10	2	-	-	-
Business Expenses	-	-	1	-	-	-
Total Instate Expenditures	\$324	\$451	\$261	\$839	\$163	\$304

Regional Purchasing Patterns

Visitor purchasing patterns varied significantly by region. Most visitors (80%) to the Interior/North and Denali/McKinley regions purchased Lodging in some form. More than two-thirds of visitors to Southcentral also spent on accommodations, while 40% of Southwest visitors purchased Lodging. Southeast visitors, who were more inclined to travel by Cruise Ship than other regional visitors, were the least likely to purchase Lodging (27%).

Eight-seven percent of visitors to the Interior/North region purchased Transportation, as did 81% of Southcentral visitors. Three-quarters of Denali/McKinley visitors also bought Transportation. In all regions except Southwest, more visitors spent on ground transportation and personal vehicle expenses than other forms of Transportation. Instate air was purchased by more Southwest visitors (44%) than visitors to all other regions.

Tours/Recreation were purchased by more than half of visitors to all regions. Most visitors, except those visiting the Southwest, bought day tours/salmon bakes and other entertainment/sports. Southwest visitors were the most devoted Guide Service customers (23% purchased in the region).

More than two-thirds of visitors to all regions of the state purchased Food/Beverage, primarily spending in restaurants. However, nearly half of Southcentral and Interior/North visitors who purchased Food/Beverage bought in grocery stores. This may be attributed, in part, to the larger proportion of highway travelers in the Southcentral and Interior/North regions.

Visitors to Southeast were more likely to purchase Gifts/Souvenirs than visitors to all other regions (83%), although, two-thirds of Southcentral and Interior/North visitors also spent on Gifts/Souvenirs. Over half (58%) of Denali visitors and over one-third of Southwest visitors purchased Gifts/Souvenirs.

Clothing which was not used for Gifts/Souvenirs, was purchased by a few visitors to all regions. Southcentral (15%) and Southeast (10%) visitors were the most likely to buy, although few did so.

A small minority of regional visitors spent on business related items, although Southeast and the Instate Ferry visitors were much less likely to spend for business purposes.

Table II-C

**Regional Purchasing Patterns
Summer 1993 - All Visitors
(Percent of Visitors Purchasing)**

Expenditure Category	South-east	South-central	Interior/North	South-west	Denali/McKinley	Instate Ferry
Lodging	27 %	69 %	81 %	40 %	79 %	23 %
Transportation	35	81	87	65	73	53
Ground Transportation	24	45	46	4	60	-
Instate Air	6	14	16	44	-	-
Rental Car/RV	3	19	3	13	-	-
Personal Vehicle Expenses	12	39	39	15	13	-
Tours/Recreation	77	68	70	53	77	<1
Day Tours/Salmon Bake	69	51	55	15	64	<1
Overnight Instate Tours	4	4	<1	19	3	-
Guide Service	1	2	<1	23	<1	-
Other Entertainment/Sports	25	36	25	22	62	<1
Food/Beverage	66	87	88	86	69	77
In Eating Places	51	81	80	80	63	76
In Bars & Lounges	16	19	15	7	5	15
In Stores	36	50	48	28	19	4
Gifts/Souvenirs	83	65	65	39	58	20
Souvenir Clothing	56	35	33	6	19	1
Alaska Native Arts & Crafts	13	9	10	8	2	-
Other Alaska Made Arts & Crafts	13	8	9	1	3	<1
All Other Gifts	76	54	56	25	49	19
Personal Expenses	41	51	42	55	21	16
Clothing	10	15	7	9	1	-
Business Expenses	-	1	1	<1	<1	-

Trends in Instate Expenditures by Region

Visitor spending has increased significantly in all but one region of Alaska since Summer 1986. Expo '86 in Vancouver, British Columbia boosted visitor volume and spending to high levels. On the other hand, the *Exxon Valdez* oil spill negatively affected spending in two regions of the state in 1989. Since 1989 almost all regions rebounded experiencing considerable growth in 1993.

Most expenditure growth occurred in Southcentral Alaska, where visitor spending increased \$86 million from Summer 1989. This suggests the region recovered positively from the impacts of the *Exxon Valdez* oil spill which seriously disrupted tourism in some areas of Southcentral Alaska in 1989.

Southeast Alaska instate visitor spending increased \$75 million between 1989 and 1993. Much of this growth can be attributed to the increased number of cruise ships with greater passenger capacity, and expanded shore excursion opportunities within the region.

Instate expenditures for the Denali/McKinley region among Package and Independent visitors more than doubled since Summer 1989. Independent visitor expenditures increased more than 60% within the region. More visitors taking land tours to Denali National Park and increased activities within the region accounted for much of this growth.

The Interior/North region of the state experienced solid expenditure growth from Summer 1989 to Summer 1993, while the Southwest experienced much more gradual growth. This slow growth suggests the Southwest was still recovering from some negative perceptions following the *Exxon Valdez* oil spill. In addition, economic woes in Europe, an important source of sport fish customers for Southwest fishing resorts, may have affected on spending in this region.

Table II-D

**Trends in Instate Expenditures by Region
Summers 1986, 1989 and 1993 - All Visitors
(In Millions of Dollars)**

Expenditure Region	<—Without May Without Skagway ¹ —>			With May With Skagway
	1986	1989	1993	1993
Southeast	\$55.4	\$64.5	\$138.2	\$152.4
Southcentral	141.0	131.0	216.8	250.5
Interior/North	50.9	51.1	68.3	79.1
Southwest	22.4	14.5	17.9	23.5
Denali/McKinley	15.1	16.1	35.8	40.4

¹ Data is presented for all three summer sampling periods which do not include May or Skagway for comparative purposes.

Expenditures by Trip/Visitor Characteristics

Regional Instate Expenditures by Trip/Visitor Characteristics

Trip Purpose

Overall, Vacation/Pleasure (VP) visitors spent more in all regions than any other trip purpose group, and had the greatest impact in Southcentral and Southeast Alaska.

Business spending was very significant in Southwest Alaska where it accounted for half of all regional visitor expenditures. Fishing opportunities attracted sizable business spending to this region including Business and Pleasure visitors. Business spending also accounted for one-quarter of Southcentral visitor spending, while one in ten visitor dollars in the Interior/Northern region came from business travelers.

Visiting Friends and Relatives spending was important to the Southcentral, Southeast and Interior/Northern regions where visitor spending accounted for 10%, 7% and 5%, respectively.

Entry Mode

Visitors arriving by Domestic Air spent more in all regions than visitors arriving by all other entry modes, with the bulk of the spending occurring in Southcentral Alaska. Visitors arriving by Cruise Ship were the second most important entry mode group in terms of overall spending, followed by Highway, Ferry and International Air.

Of all visitors arriving by Cruise Ship, more than half (53%) of total expenditures were spent in Southeast. In the Interior/North region of the state, Cruise Ship and Highway entries together accounted for over one-third of visitor spending. This was partially attributed to the heavy presence of Highway visitors in the Interior/North and Cruise Ship passengers taking land tours to the Fairbanks area.

Though a smaller group, visitors arriving by Ferry spent throughout Alaska, while spending by International Air visitors was concentrated in the Southcentral region.

Origin

The significance of visitor spending from each region of origin varied throughout Alaska. Visitors from the Western United States dominated visitor spending in Southeast and Southcentral Alaska although visitors from across the United States contributed significantly to each of these regions. Overseas visitors spent significantly in Southcentral Alaska; one in ten Southcentral visitors dollars came from Overseas visitors.

Midwesterners made the most significant contribution in the Interior/North region, while Easterners spent the most in Southwest Alaska. Half of visitor spending in Denali/McKinley can be attributed to visitors from the South and Midwest regions of the United States.

Table II-E

Regional Instate Expenditures by Trip/Visitor Characteristics
Summer 1993 - All Visitors
(In Millions of Dollars)

Visitor Type	South-east	South-central	Interior/North	South-west	Denali/McKinley	Instate Ferry
Trip Purpose						
Vacation/Pleasure	\$138.3	\$169.0	\$65.7	\$11.1	\$36.8	\$17.9
Visiting Friends/Relatives	7.9	25.0	5.8	0.6	1.4	1.5
Business/Pleasure	4.2	38.8	4.6	9.7	2.1	0.1
Business Only	2.0	17.8	3.0	2.1	<0.1	<0.1
Entry Mode						
Domestic Air	73.1	181.7	43.9	20.4	22.7	1.9
Cruise Ship	61.9	26.4	15.4	-	12.9	-
Highway ¹	6.8	24.9	14.8	0.2	1.9	5.9
Ferry	9.6	6.5	3.9	0.1	1.5	11.6
International Air	0.9	11.1	1.0	2.8	1.4	0.2
Origin						
West	50.8	70.4	19.4	2.3	5.9	8.1
South	25.9	61.1	16.1	0.1	10.3	2.4
Midwest	22.2	50.1	22.5	4.5	11.7	3.3
East	34.4	33.6	13.5	13.7	8.8	1.9
Canada	10.1	3.7	2.3	-	0.3	2.5
Overseas	8.7	31.1	5.2	1.4	3.3	1.4
G/S/A ²	1.3	12.9	1.8	1.3	0.7	0.7
Great Britain	1.5	0.5	0.1	-	0.1	0.2
Japan	1.8	5.9	0.6	0.1	1.3	-
Australia/New Zealand	1.3	6.6	1.3	-	0.8	0.2
Total Instate Expenditures	\$152.4	\$250.5	\$79.1	\$23.5	\$40.4	\$19.5

¹ Highway mode includes personal vehicle expenses only. Not included are Motorcoaches and trucks.
² Germany/Switzerland/Austria

Regional Average Expenditures by Trip/Visitor Characteristics

Trip Purpose

Average visitor spending varied significantly for each region for all trip purpose groups. Business and Pleasure (BP) visitors spent the most in Southeast (\$351) on average per person per trip, closely followed by Visiting Friends and Relatives (\$346) and Vacation Pleasure visitors (\$326).

In the Southcentral region, BP visitors were the biggest spenders, contributing \$761 per person, on average.

Business Only visitors were the biggest per person per trip spenders in the Interior/North region, contributing \$264, although all trip purpose groups spent nearly equal amounts.

VPs and BPs spent significantly more per person in Southwest than any other region of the state, with each group contributing more than \$1,350 per person per trip. BPs and VPs were also the largest per person contributors in Denali, at \$203 and \$166, respectively.

Entry Mode

Overall, Domestic Air and International Air visitors spent more per person per trip in all regions of Alaska, but had the greatest impact per person in the Southwest at \$844 and \$1,298, respectively. International Air visitors were the biggest spenders in Southcentral.

In Southeast, Domestic and International Air visitors also spent more per person than other entry mode groups and nearly equal amounts at \$488 and \$466 respectively.

Cruise Ship expenditures were distributed evenly across the regions, with the exception of Southwest and Instate Ferry which are not cruise destinations. Highway and Ferry visitors, the remaining entry mode groups, spent the most per person in Southcentral.

Origin

Overseas visitors were generally larger per person spenders than United States and Canadian visitors. Japanese visitors spent more per person than visitors from all other origin groups, in all regions, except the Interior/North and aboard the State Ferry. The Japanese contributed a notable \$1,314 per person in the Southwest. Australia/New Zealanders contributed significantly more per person in Southcentral and the Interior, while visitors from Germany/Switzerland/Austria were inclined to spend more in the Southwest and Southcentral.

Among U.S. visitors, spending was spread evenly within each particular region, with the exception of Southwest Alaska. Eastern visitors contributed a substantial \$2,113 per person in the Southwest, followed by Midwesterners at \$738 per person. Easterners also contributed the most in Southeast at \$537 per person. Canadian visitors spent the most aboard the Ferry and in Southcentral Alaska at \$297 and \$258 per person, respectively.

Table II-F

Regional Average Expenditures by Trip/Visitor Characteristics
Summer 1993 - All Visitors
(Per Person/Per Trip)

Visitor Type	South-east	South-central	Interior/North	South-west	Denali/McKinley	Instate Ferry
Trip Purpose						
Vacation/Pleasure	\$326	\$441	\$263	\$1,367	\$166	\$326
Visiting Friends/Relatives	346	325	257	97	92	207
Business/Pleasure	351	761	240	1,366	203	55
Business Only	192	399	264	304	77	145
Entry mode						
Domestic Air	488	494	279	844	173	112
Cruise Ship	259	288	298	-	218	-
Highway ¹	135	364	196	128	47	279
Ferry	336	440	265	610	118	461
International Air	466	865	259	1,298	257	136
Origin						
West	339	383	267	213	129	406
South	288	468	277	38	171	326
Midwest	276	462	280	738	170	208
East	537	450	276	2,113	181	286
Canada	175	258	126	-	59	297
Overseas	324	744	214	1,202	177	213
G/S/A ²	127	777	167	1,303	87	154
Great Britain	363	182	131	-	219	389
Japan	980	921	340	1,314	299	-
Australia/New Zealand	254	868	350	-	214	284

¹ Highway mode includes personal vehicle expenses only. Not included are Motorcoaches and trucks.
² Germany/Switzerland/Austria

Regional Instate Expenditures by Travel Type

Package

Package visitors were responsible for over one-third (38%) of total visitor dollars spent in Alaska. Package visitors contributed more in Southeast, the Interior/North and Denali/McKinley than Independent visitors, spending \$86, \$40 and \$30 million, respectively. Package visitors were also responsible for one-quarter of Southcentral visitor spending.

Among the Package tour subgroups, one-half of Southeast's visitor dollars came from Round Trip Cruises, while one-third was contributed by Cruise/Tours visitors. Cruise/Tour expenditures also constituted the largest portion of Package visitor spending in Southcentral, the Interior/North and Denali/McKinley regions, all of which benefited from overnight land tour packages by Cruise Ship passengers.

Visitors on Other Tours which included fishing resort packages, adventure tours and tours not using a cruise ship, were responsible for virtually all money spent on package tours in Southwest and on the State Ferry.

Independent

Independent travelers accounted for one-third (33%) of total visitor dollars spent in Alaska. Southcentral was dominated by Independent visitors who spent significantly more in Southcentral than other regions (\$109 million). Southeast ranked second in Independent visitor spending at \$39 million, followed by the Interior/North at \$24 million.

Independent VP visitors were the biggest spenders in all regions except Southwest, where business travelers contributed eight of every ten Independent visitor dollars. Independent business travelers were also important in Southcentral where they contributed one-third of total visitor spending.

Inde-Package

Similar to Package and Independent visitors, Inde-package travelers spent nearly one-third of total visitor dollars. The Southwest region and Ferry received more from Inde-package visitors than other travel types, capturing \$15 and \$13 million, respectively. However, Inde-package visitors spent the most in Southcentral (\$78 million) followed by Southeast (\$27 million).

VPs were the largest Inde-package contributors in all regions, although Inde-package business travelers were important in Southcentral, contributing one-quarter of regional visitor spending.

Table II-G

Regional Instate Expenditures by Travel Type
Summer 1993 - All Visitors
(In Millions of Dollars)

Travel Type	South-east	South-central	Interior/North	South-west	Denali/McKinley	Instate Ferry
Package Total	\$85.7	\$63.8	\$40.2	\$2.4	\$29.5	1.2
Round-Trip Cruise	40.4	1.3	-	-	-	-
Cruise/Tour	25.8	40.7	32.9	<0.1	24.0	-
Cruise/Air	7.9	3.7	0.5	-	1.1	-
Other Package Tour	9.0	17.2	6.1	2.4	4.2	1.1
Independent	39.4	109.1	24.0	6.6	3.6	5.4
Vacation/Pleasure	30.9	55.4	12.8	0.5	2.9	4.3
Visiting Friends/Relatives	6.2	15.2	4.8	0.5	0.5	1.0
Business/Pleasure	0.5	20.8	3.4	3.5	0.1	0.1
Business Only	1.9	17.8	3.0	2.1	<0.1	-
Inde-Package¹	27.3	77.7	14.9	14.5	7.3	13.0
Vacation/Pleasure	25.2	50.9	13.2	8.3	4.8	12.5
Visiting Friends/Relatives	1.4	9.6	1.0	0.1	0.9	0.5
Business/Pleasure	0.8	17.1	0.8	6.2	1.7	<0.1
Business Only	-	-	-	-	-	-

¹ Inde-package visitors are Independents who plan to purchase sightseeing tours during their trip.

Average Regional Instate Expenditures by Travel Type

Package

Per person per trip spending varied significantly among Package visitors by region. Southwest benefited from the highest per person spending at \$1,381. Southcentral and the Interior/North nearly tied in second place, with visitors to the Interior/North spending \$319 per person and visitors to Southcentral spending \$318 per person. Southeast followed at \$257 per person, while Package visitors to Denali/McKinley and aboard the Ferry spent the least per person per trip.

Package visitors were inclined to spend more on Other Tours, including fishing resort packages, adventure tours and tours not using a cruise ship, than Round Trip Cruise, Cruise/Tour and Cruise/Air packages. Non-cruise related package visitors (Other Package Tours) spent more on average than cruise package visitors in Southwest, Southeast and Southcentral.

Round Trip Cruisers spent more heavily in Southeast at \$250 per person, but did not spend in other regions except Southcentral where per person spending averaged \$102 dollars. Cruise/Tour spending was spread across the regions, although Southwest received a significantly larger per person sum (\$513) than all other regions, suggesting these visitors took trips to the Pribilofs and Katmai. Cruise/Tour visitors also contributed significantly in Southcentral at \$374 per person. Visitors using Cruise/Air were more inclined to spend in the Interior, Denali and Southeast regions where they contributed \$248, \$219 and \$196, per person per trip, respectively.

Independent

Overall, Independent visitors spent more per person in Southeast (\$484) and Southcentral (\$465) than in other regions. VPs were big per person spenders in Southeast and Southcentral. However, business travelers, particularly those including pleasure on their trip, made significant contributions in the Southwest and Southcentral regions. In Southcentral, this may be attributed to Anchorage, the state's economic and commerce center, while the Southwest is home to many exclusive guided sport fishing resorts.

Inde-Package

Inde-package visitors to Southwest spent more per person (\$2112) than other Package and Independent visitors in all other regions. Inde-package visitors were also important contributors in Southeast and Southcentral where they spent an average \$494 and \$651 per person per trip, respectively.

VP Inde-package visitors spent a high of \$2,299 in Southwest, a number influenced by the high-end sport fishing lodge market. VPs were also big per person spenders in Southcentral and Southeast. Inde-package BP visitors made significant per person contributions in all regions, except on the State Ferry where business travelers spent much less.

Table II-H

Average Regional Instate Expenditures by Travel Type
Summer 1993 - All Visitors
(Per Person/Per Trip)

Travel Type	South-east	South-central	Interior/North	South-west	Denali/McKinley	Instate Ferry
Package Total	\$257	\$318	\$319	\$1,381	\$220	\$167
Round-Trip Cruise	250	102	-	-	-	-
Cruise/Tour	251	374	320	513	228	-
Cruise/Air	196	86	248	-	219	-
Other Package Tour	322	484	301	1,443	178	170
Independent	484	465	228	338	75	236
Vacation/Pleasure	608	570	217	171	79	255
Visiting Friends/Relatives	381	255	250	86	85	182
Business/Pleasure	90	621	220	895	32	197
Business Only	207	400	259	304	4	-
Inde-Package¹	494	651	206	2,112	110	383
Vacation/Pleasure	510	571	199	2,299	92	406
Visiting Friends/Relatives	287	584	294	610	98	297
Business/Pleasure	640	1,254	287	1,956	316	26
Business Only	-	-	-	-	-	-

¹ Inde-package visitors are Independents who plan to purchase sightseeing tours during their trip.

Regional Instate Expenditures by Mode Use Group

Total Regional Expenditures by Mode Use

Mode use groups include all visitors who used a specific mode to enter and/or exit Alaska. For example, a visitor entering by Domestic Air and exiting by Ferry would be included in both mode use groups. This analysis shows the significance of entry and exit transportation for each region.

Visitors who entered and/or exited the state by Domestic Air spent significantly more than visitors who used all other transportation modes in all regions, except the Ferry. Cruise Ships ranked second in terms of visitor spending by mode use for all regions except Southwest and Ferry. Domestic Air and Cruise Ship combined accounted for more than three-quarters of total visitor spending in all regions except Southwest and Ferry.

Visitors traveling by Domestic Air accounted for half (\$96 million) of Southeast expenditures, followed by Cruise Ship. Together, these two modes accounted for eight of every ten dollars spent in Southeast. Visitors who used the Ferry for either entering or exiting the state spent \$13 million in Southeast (exclusive of State Ferry spending), while visitors traveling by Highway contributed \$12 million to the Southeast region.

Southcentral visitor spending was dominated by visitors using Domestic Air (\$211 million) for either entering or exiting the state. Cruise Ship mode use was second in importance for Southcentral visitor spending at \$48 million. Highway and International Air users contributed more in Southcentral than all other regions at \$29 million and \$16 million, respectively. Ferry mode users also influenced Southcentral, spending \$11 million.

Like Southeast and Southcentral, visitors traveling by Domestic Air and Cruise Ship were the biggest spenders at \$61 million and \$33 million, respectively. Highway users also contributed \$18 million, followed by Ferry and International Air users.

In the Southwest region, visitors traveling by Domestic Air spent more than visitors using other transportation modes (\$20 million). Visitors traveling by Highway, Ferry and International Air spent at much lower levels, while Cruise Ship visitors had little impact on Southwest.

Denali was heavily impacted by visitors who used Domestic Air and Cruise Ship. Highway, Ferry and International Air mode users spent in Denali, although at much lower levels.

Table II-I

**Total Regional Expenditures by Mode Use
Summer 1993 - All Visitors
(In Millions of Dollars)**

Mode Use	South- east	South- central	Interior/ North	South- west	Denali/ McKinley	Instate Ferry
Domestic Air	\$95.7	\$210.5	\$60.8	\$20.4	\$36.4	\$3.9
Cruise Ship	77.2	47.6	33.0	<0.1	24.9	-
Highway ¹	11.7	28.8	17.7	0.3	2.9	11.2
Ferry	13.3	11.4	7.4	0.1	2.4	17.2
International Air	1.4	15.9	1.6	2.9	1.7	0.3

¹ Highway mode includes personal vehicle expenses only. Not included are Motorcoaches and trucks.

Average Regional Expenditures by Mode Use

Visitors using Domestic Air spent the most per person per trip in all regions, except Southcentral where International Air visitors spent more per person.

In Southeast, Domestic Air users spent the most per person (\$415), closely followed by International Air. Ferry, Cruise Ship and Highway mode users contributed \$298, \$244 and \$178 per person, respectively.

International Air users spent more per person in Southcentral than visitors arriving by all other modes (\$686). Domestic Air users ranked second in per person spending, followed by Ferry and Highway users who spent nearly equal amounts. Cruise Ship users spent the least per person in Southcentral, but still a significant amount.

All mode users in the Interior/North region spent relatively similar amounts per person, ranging from \$203 for Highway users to \$311 for Cruise Ship travelers. Interestingly, Cruise Ship visitors spent more per person in the Interior than visitors using all other modes, and more than Cruise Ship visitors in all regions except Southwest. Domestic Air users were the second biggest spenders in the Interior, surpassing International Air by \$22 per person and Ferry users by \$26 per person. Highway users spent the least per person in the Interior/North.

The Southwest benefited from higher per person spending than all other regions for all forms of mode use except Highway. Per person spending was the greatest among Domestic and International Air users, largely because the Domestic and International sport fishing resort markets traveled to and from Alaska by air. The Southwest also benefited from visitors traveling by Cruise Ship and Ferry who took overnight land tours to the Southwest. Highway users tended to spend less than other mode users in the Southwest, largely a result of the limited road system there and lack of road access.

International Air and Cruise Ship users were the biggest spenders in the Denali/McKinley regions, contributing nearly equal amounts, \$222 and \$221 per person, respectively. Domestic Air users ranked third in per person spending by only \$35. Ferry and Highway users spent the least per person per trip.

Ferry users spent the most per person per trip on the Ferry (\$452), followed by Highway users (\$352) who were likely to use the Ferry to transport their vehicles within the state.

Table II-J

**Average Regional Expenditures by Mode Use
Summer 1993 - All Visitors
(Per Person/Per Trip)**

Mode Use	South-east	South-central	Interior/North	South-west	Denali/McKinley	Instate Ferry
Domestic Air	\$415	\$460	\$281	\$842	\$186	\$174
Cruise Ship	244	275	311	513	221	-
Highway ¹	178	366	203	163	61	352
Ferry	298	391	255	610	108	452
International Air	403	686	259	749	222	183

¹ Highway mode includes personal vehicle expenses only. Not included are Motorcoaches and trucks.

Total Instate Expenditures by Community

The majority of visitor dollars were spent in the larger more popular communities and regions, although a substantial portion of visitor expenditures reached many smaller communities and regions. This distribution of expenditures reflected the widespread travel and economic benefits of visitors throughout the state, particularly Vacation/Pleasure visitors who were the largest contributors overall of community visitor expenditures.

Anchorage captured more visitor dollars than all other communities in Alaska (\$163 million), accounting for one-quarter of total statewide community expenditures. Vacation/Pleasure visitors contributed more than two-thirds of visitor spending in Anchorage.

Fairbanks was the second more popular community for visitor spending at \$58 million, representing 10% of the statewide total for community expenditures. Fairbanks received a larger proportion of VP expenditures than Anchorage, with more than three-quarters contributed by VPs.

Juneau ranked third in visitor spending, just behind Fairbanks at \$53 million. Nine in ten Juneau visitor dollars came from Vacation/Pleasure visitors.

Next to Juneau, Denali/McKinley was the most popular visitor destination capturing \$40 million of VP expenditures. Like Juneau, 90% of Denali expenditures were contributed by Vacation/Pleasure visitors.

Ketchikan and Skagway each captured a significant portion of visitor spending at \$30 million and \$29 million, respectively. Southeast's expenditures can be attributed to the high number of cruise ships sailing the Inside Passage. Vacation/Pleasure visitors were responsible for over 90% of visitor expenditures in Ketchikan and Skagway.

The Ferry captured \$20 million in visitor spending, and similar to other top spending communities, \$18 million was contributed by Vacation/Pleasure visitors. Kenai and Soldotna followed the State Ferry in visitor expenditures and together received \$17 million.

Visitors to locations other than the 30 communities listed, the Instate Ferry and Denali/McKinley, contributed a substantial \$99 million throughout Alaska, with three-quarters coming from Vacation/Pleasure visitors. Undistributed expenses, Other Southcentral communities and Glacier Bay were the largest recipients at \$33, \$12 and \$10 million, respectively. Wilderness locations in Southcentral and Southeast captured significant shares of visitor expenditures as well, receiving \$7 and \$6 million, respectively.

Table II-K

Total Instate Expenditures by Community
Summer 1993
(In Millions of Dollars)

Community	All Visitors	Vacation/ Pleasure Visitors
Anchorage	\$162.5	\$104.2
Fairbanks	57.9	46.3
Juneau	53.0	47.5
Denali/McKinley	40.4	36.8
Ketchikan	29.6	26.9
Skagway	29.2	28.1
Instate Ferry	19.5	17.9
Kenai/Soldotna	16.9	15.1
Sitka	13.8	11.8
Homer	12.1	7.9
Seward	11.9	9.3
Wilderness Locations - Southwest	9.9	8.5
Glacier Bay	9.7	8.5
Valdez	9.2	7.7
Tok	7.5	7.2
Wilderness Locations - Southcentral	6.7	3.9
Wilderness Locations - Southeast	5.6	4.5
Dillingham	5.4	0.1
Cordova	4.5	4.5
Glenallen	4.3	1.3
Other Kenai Peninsula	4.2	3.9
Haines	4.0	3.9
Kodiak	3.5	1.7
Palmer	2.8	1.3
Wasilla	2.6	1.5
Nome	2.3	2.3
Kotzebue	1.7	1.6
Illiamna	1.3	0.3
Petersburg	1.2	1.1
Barrow	1.0	1.0
Wrangell	0.9	0.9
Katmai	0.8	0.1
Prudhoe Bay	0.8	0.8
Whittier	0.6	0.5
Bethel	0.5	*
Pribilofs	0.1	0.1
Other Prince William Sound	<0.1	<0.1
Other Southcentral Communities	12.2	7.8
Other Interior Communities	7.8	6.5
Other Southeast Communities	5.5	5.2
Other Southwest Communities	2.0	0.3
Undistributed Expenses	32.5	27.8
Total Instate Expenditures	\$597.9	\$466.7

*Sample size too small for analysis



Chapter III: Expenditures by Vacation/ Pleasure Visitors

***Expenditures by All Vacation/Pleasure
Visitors***

Expenditures by VPs by Mode Use

Expenditures by VPs by Travel Type

Expenditures by VPs by Origin

Expenditures by VPs by Region



Expenditures by Vacation/Pleasure Visitors

Introduction

This chapter focuses on Vacation/Pleasure (VP) visitors, the largest segment (71%) of Alaska's summer visitors. Over the years VP numbers grew considerably, nearly doubling between 1989 and 1993. VPs in Summer 1993 averaged nine nights in Alaska, traveled in pairs and expended a total of \$467 million.

This chapter provides a detailed look at VP expenditures including an analysis by mode use, travel type, origin and region of purchase. Each section discusses visitor expenditures in terms of total expenditures and average per person per trip expenditures.

Expenditures of All Vacation/Pleasure Visitors

Total Vacation/Pleasure Instate Expenditures by Category

During summer 1993 Vacation/Pleasure (VP) visitors spent a total of \$467 million dollars in Alaska. The largest slice of the VP expenditure pie was consumed by Tours/Recreation (33%). Day tours took the biggest bite (18%) of the Tours/Recreation slice.

Transportation and Lodging expenditures were nearly equal. VPs devoted nearly 19% of their expenditures (\$87 million) to Transportation. Lodging expenditures were slightly lower, 18% or \$85 million of total VP expenditures.

VP visitors spent \$63 million on gift and souvenir items, 13% of total expenditures. VP visitors also spent 10% of their expenditures on food and beverages. A small portion of VP expenditures was spent on personal items such as stamps, film and newspapers and clothing. Very few VPs made any business purchases in Summer 1993.

A more specific break down of expenditures is listed on Table III-A.

Graph III-A

**Total Instate Expenditures by Category
Summer 1993 – Vacation/Pleasure Visitors
(In Millions of Dollars)**

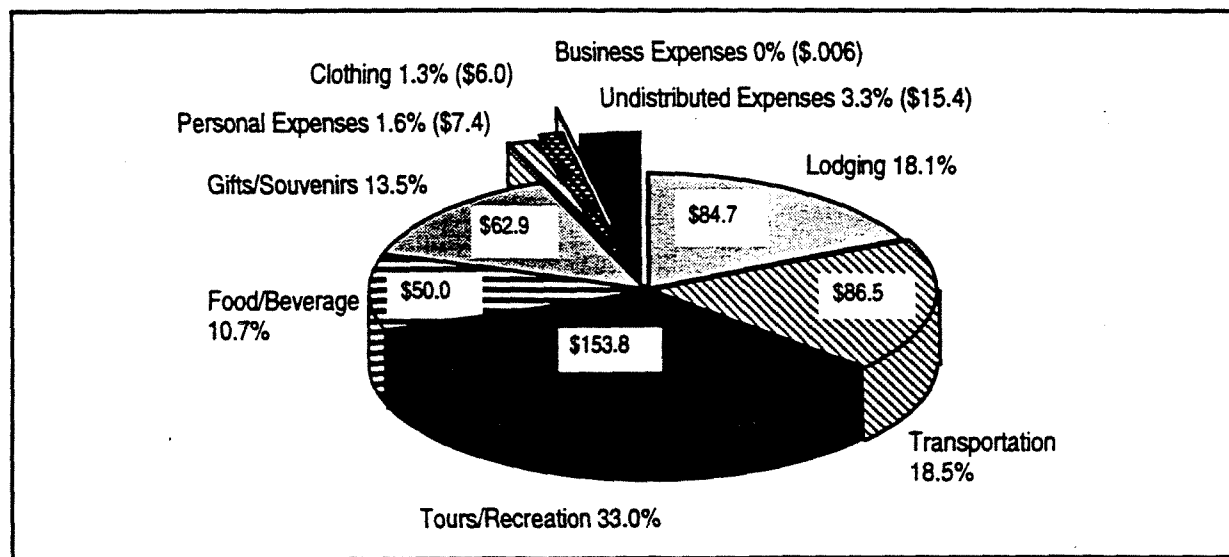


Table III-A

Total Instate Expenditures by Category
Summer 1993 – Vacation/Pleasure Visitors
(In Millions of Dollars)

Expenditure Category	Total Dollars	% of Visitor Expenditures
Lodging	\$84.7	18.1 %
Transportation	86.5	18.5
Ground Transportation	32.6	7.0
Instate Air	10.7	2.3
Rental Car/RV	12.9	2.8
Personal Vehicle Expenses	13.9	3.0
Instate Ferry	16.2	3.5
Tours/Recreation	153.8	33.0
Day Tours/Salmon Bake	83.3	17.9
Overnight Instate Tours	61.2	13.1
Guide Service	1.9	0.4
Other Entertainment/Sports	7.4	1.6
Food/Beverage	50.0	10.7
In Eating Places	35.9	7.7
In Bars & Lounges	2.5	0.5
In Stores	11.7	2.5
Gifts/Souvenirs	62.9	13.5
Souvenir Clothing	17.4	3.7
Alaska Native Arts & Crafts	7.8	1.7
Other Alaska Made Arts & Crafts	8.3	1.8
All Other Gifts	29.4	6.3
Personal Expenses	7.4	1.6
Clothing	6.0	1.3
Business Expenses	<0.1	-
Undistributed Expenses	15.4	3.3
Total Instate Expenditures	\$466.7	100.0 %

Sources of Expenditures of Vacation/Pleasure Visitors by Category

Visitor instate expenditures were derived from several sources within the Visitor Expenditure Survey (VES) including: prepaid package tours; daily diary listings which also contain overnight instate tour information; and ferry transportation expenditures.

Prepaid tour expenditures were derived from prepaid package tour components and accounted for 22% or \$105 million of all VP spending. Nearly one-half of VP prepaid package dollars were devoted to Lodging. More than one-third of VP dollars went to instate Transportation with the bulk used to pay for Ground Transportation.

Daily Diary expenditures accounted for the majority (71%) of VP expenditures totaling approximately \$333 million. Most of these VP dollars were spent on Tours/Recreation (42%). The second largest portion (19%) was spent on Gifts/Souvenirs. These expenditures were recorded by the visitors each day as they traveled in Alaska.

Overnight instate tours were also recorded by visitors in the daily diary portion of the survey. They appear in two places on Table III-B, under Tours/Recreation in the Daily Diary section and in their own separate column to show which categories they impacted. The categories most impacted were Tours/Recreation (\$19 million), Transportation (\$9 million) and Lodging (\$8 million).

VP expenditures for **Ferry transportation to and from Alaska** generated \$13 million in Summer 1993. The Alaska Marine Highway System revenues accrue to the State. This is true for visitor dollars spent on Ferry travel to and from Alaska and those spent while sailing in Alaska waters.

Table III-B

Sources of Expenditures by Category
Summer 1993 - Vacation/Pleasure Visitors
(In Millions of Dollars)

Expenditure Category	Prepaid	Daily Diary	Ferry To/From	Overnight Instate Tours ¹	TOTAL ³
Lodging	\$51.6	\$33.1	-	\$8.1	\$92.8
Transportation	37.3	35.8	13.4	8.9	95.4
Ground Transportation	29.6	3.0	-	3.3	35.9
Instate Air	7.0	3.6	-	5.4	16.0
Rental/Car/RV	0.1	12.8	-	<0.1	12.9
Personal Vehicle Expenses	-	13.9	-	-	13.9
Instate Ferry	0.6	2.2	13.4	0.1	16.3
Tours/Recreation²	14.9	138.9	-	18.7	172.5
Day Tours/Salmon Bake	12.7	70.7	-	3.0	86.4
Overnight Instate Tours	-	61.2	-	1.8 ⁴	61.2
Guide Service	1.9	<0.1	-	12.8	14.7
Other Entertainment/Sports	0.4	7.0	-	1.0	8.4
Food/Beverage	0.6	49.4	-	2.9	52.9
In Eating Places	0.6	35.3	-	2.9	38.8
In Bars & Lounges	-	2.5	-	-	2.5
In Stores	-	11.7	-	-	11.7
Gifts/Souvenirs	-	62.9	-	-	62.9
Souvenir Clothing	-	17.4	-	-	17.4
Alaska Native Arts & Crafts	-	7.8	-	-	7.8
Other Alaska Made Arts & Crafts	-	8.3	-	-	8.3
All Other Gifts	-	29.4	-	-	29.4
Personal Expenses	-	7.4	-	0.3	7.7
Clothing	-	6.0	-	-	6.0
Business Expenses	-	<0.1	-	-	<0.1
Undistributed Expenses	-	-	-	-	14.9
Instate Tour Profit /Overhead	-	-	-	9.3	9.3
Total Instate Expenditures	\$105.0	\$333.4	\$13.4	\$61.2	\$466.7

¹ From Daily Diary
² Tours/Recreation total for Daily Diary includes overnight instate tours. Overnight instate tours are also shown here by their contribution to each expense category.
³ Grand total (\$466.7 million) does not equal the sum of the total column to avoid double counting of Overnight Instate Tours under the Daily Diary and Overnight Instate Tour columns.
⁴ This includes expenditures made by Elderhostel travelers.

Average Vacation/Pleasure Visitor Instate Expenditures

VP visitors spent more on average (\$780) during their Alaska vacations than the average visitor. Most other trip purpose groups spent much less per person per trip. VFRs spent \$419, and visitors traveling for Business Only spent \$399 per person per trip. Business and Pleasure visitors were the only ones who spent more, averaging \$912 per person per trip.

VP visitors spent \$90 per person per night where the average visitor spent \$81. Per party per trip expenditures by VP visitors were \$260 higher than the \$1,479 spent by the average visitor. Likewise VP per party per night expenditures were higher (\$34 more) than the average visitor's of \$167.

Graph III-B

Average Instate Expenditures
Summer 1993 - Vacation/Pleasure Visitors
(Per Person/Per Night - Per Person/Per Trip)
(Per Party/Per Night - Per Party/Per Trip)
(In Millions of Dollars)

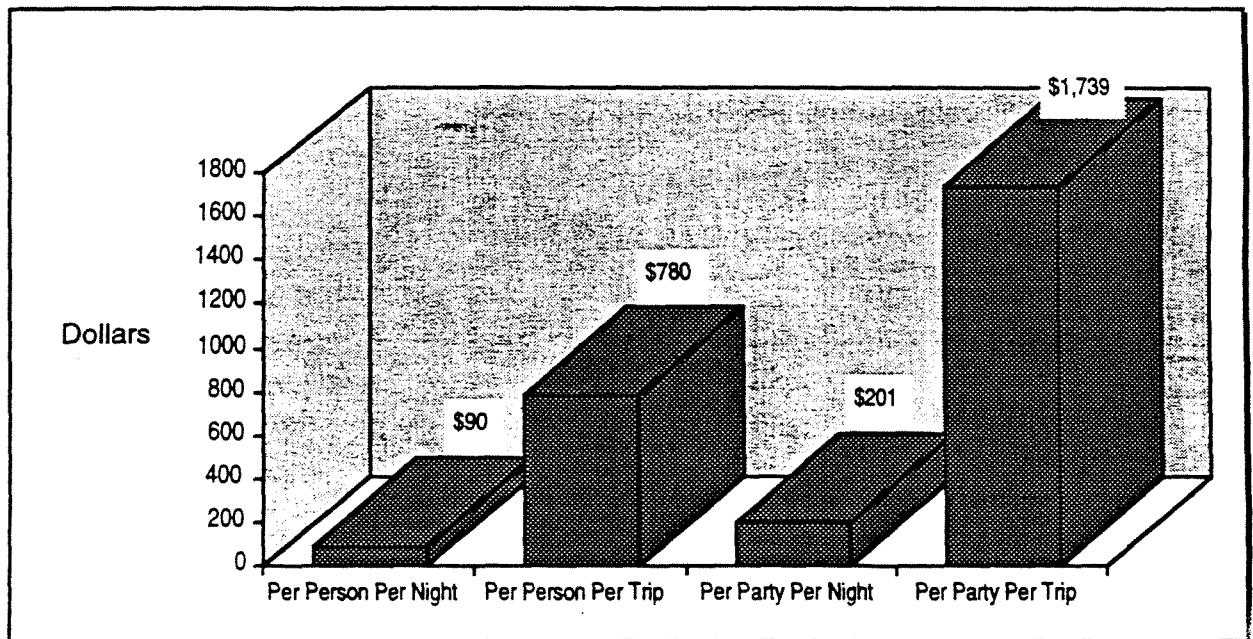


Table III-C

Average Instate Expenditures
Summer 1993 - Vacation/Pleasure Visitors
 (Per Person/Per Night - Per Person/Per Trip)
 (Per Party/Per Night - Per Party/Per Trip)

Expenditure Category	Per Person Per Night	Per Person Per Trip	Per Party Per Night	Per Party Per Trip
Lodging	\$16	\$142	\$36	\$316
Transportation	17	144	37	322
Ground Transportation	6	54	14	121
Instate Air	2	18	5	40
Rental Car/RV	2	22	6	48
Personal Vehicle Expenses	3	23	6	52
Instate Ferry	3	27	7	60
Tours/Recreation	30	257	66	573
Day Tours/Salmon Bake	16	139	36	311
Overnight Instate Tours	12	102	26	228
Guide Service	-	3	1	7
Other Entertainment/Sports	1	12	3	28
Food/Beverage	10	84	22	186
In Eating Places	7	60	15	134
In Bars & Lounges	-	4	1	9
In Stores	2	19	5	43
Gifts/Souvenirs	12	105	27	234
Souvenir Clothing	3	29	7	65
Alaska Native Arts & Crafts	2	13	3	29
Other Alaska Made Arts & Crafts	2	14	4	31
All Other Gifts	6	49	13	110
Personal Expenses	1	12	3	27
Clothing	1	10	3	22
Business Expenses	-	-	-	-
Undistributed Expenses	3	26	6	57
Total Instate Expenditures	\$90	\$780	\$201	\$1,739

Expenditures of Vacation/Pleasure Visitors by Mode Use

Total Vacation/Pleasure Visitor Instate Expenditures by Mode Use

VP visitors made wide use of the various transportation modes to Alaska. This discussion provides valuable information regarding distribution of VP dollars by the modes used either to enter and/or exit Alaska.

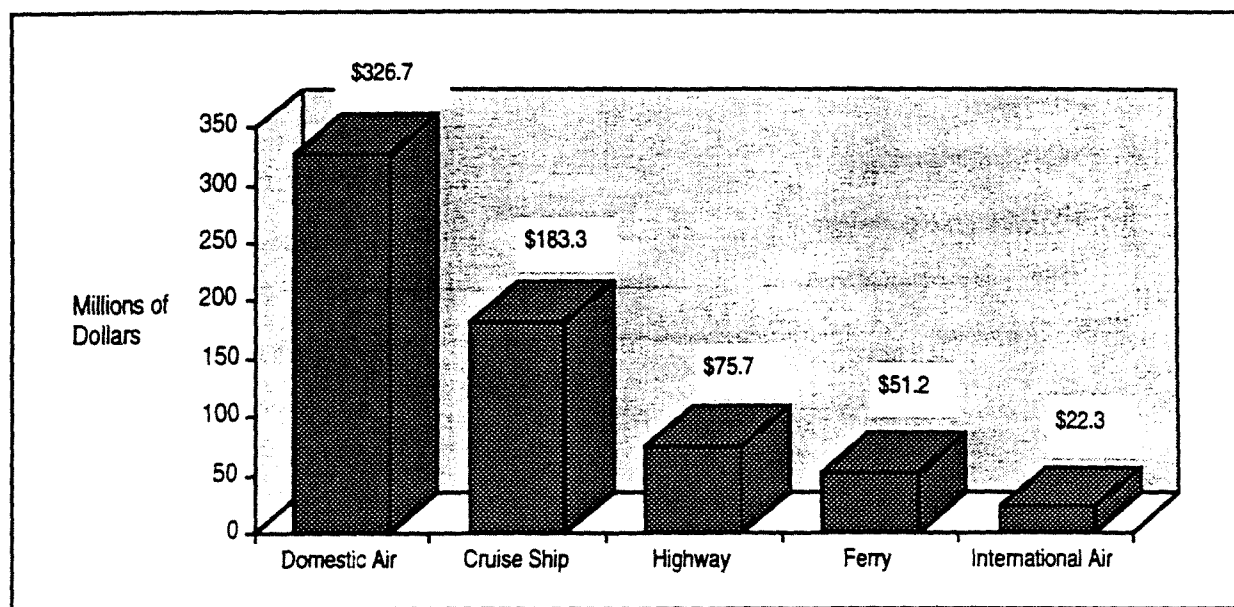
The mode most impacted by VPs was Domestic Air garnering \$327 million in Summer 1993. Some Domestic Air mode users flew round trip while others cruised one way and flew the other direction. VP Domestic Air users expended the greatest portion on Tours/Recreation (\$111 million) followed by Lodging (\$71 million) and Transportation (\$58 million).

Cruise ship mode users were the second largest spending group expending \$183 million in Alaska. Once again VP visitors spent heavily on Tours/Recreation, and Lodging. However, the Gifts/Souvenirs category replaced Transportation as the third largest expenditure category for cruise visitors.

Highway mode VPs expended \$76 million, with the largest portions attributed to Transportation, Food/Beverage and Tours/Recreation.

Graph III-C

**Total Instate Expenditures by Mode Use
Summer 1993 - Vacation/Pleasure Visitors
(In Millions of Dollars)**



Ferry visitors were similar to Highway mode users spending the greatest portion of their \$51 million on Transportation. Lodging and Food/Beverage were the second and third most important spending categories for Ferry users.

International Air mode users spent \$22 million with Tours/Recreation accounting for the greatest portion of expenditures followed by Transportation.

Table III-D

**Total Instate Expenditures by Mode Use
Summer 1993 - Vacation/Pleasure Visitors
(In Millions of Dollars)**

Expenditure Category	MODE USE				
	Domestic Air	Cruise Ship	Highway ¹	Ferry	International Air
Lodging	\$71.2	\$41.6	\$9.7	\$8.3	\$3.8
Transportation	58.3	30.4	20.9	20.3	4.5
Ground Transportation	30.7	24.5	0.3	2.0	1.7
Instate Air	8.8	4.9	0.6	0.6	1.3
Rental Car/RV	11.8	0.8	<0.1	0.4	0.9
Personal Vehicle Expenses	4.0	0.2	9.7	2.6	0.2
Instate Ferry	2.8	-	10.1	14.5	0.2
Tours/Recreation	111.0	57.9	11.1	7.1	6.9
Day Tours/Salmon Bake	47.2	56.0	8.6	4.7	1.9
Overnight Instate Tours	58.0	1.0	0.7	1.6	3.6
Guide Service	0.8	-	-	-	1.1
Other Entertainment /Sports	4.9	0.9	1.9	0.8	0.4
Food/Beverage	33.7	12.7	12.8	7.3	2.8
In Eating Places	26.6	10.9	6.9	4.8	2.1
In Bars & Lounges	1.7	0.7	0.4	0.2	0.1
In Stores	5.4	1.0	5.5	2.2	0.6
Gifts/Souvenirs	37.8	32.5	9.7	5.2	2.4
Souvenir Clothing	9.2	10.4	3.1	1.5	0.4
Alaska Native Arts & Crafts	5.0	3.1	1.5	0.5	0.2
Other Alaska Made Arts & Crafts	6.9	2.0	0.5	0.5	0.1
All Other Gifts	16.6	17.0	4.6	2.7	1.7
Personal Expenses	4.0	1.8	2.3	0.8	0.5
Clothing	4.2	2.4	0.9	0.2	0.9
Business Expenses	-	-	<0.1	<0.1	-
Undistributed Expenses	6.6	4.1	8.5	2.1	0.4
Total Instate Expenditures	\$326.7	\$183.3	\$75.7	\$51.2	\$22.3

¹ Highway mode includes personal vehicle expenses only. Not included are Motorcoaches and trucks.

Average Vacation/Pleasure Visitor Instate Expenditures by Mode Use

International Air VPs spent more per person per trip than any other mode use group averaging \$1,281. The Tours/Recreation, Transportation and Lodging categories garnered most International Air VP dollars at \$396, \$257 and \$216 respectively.

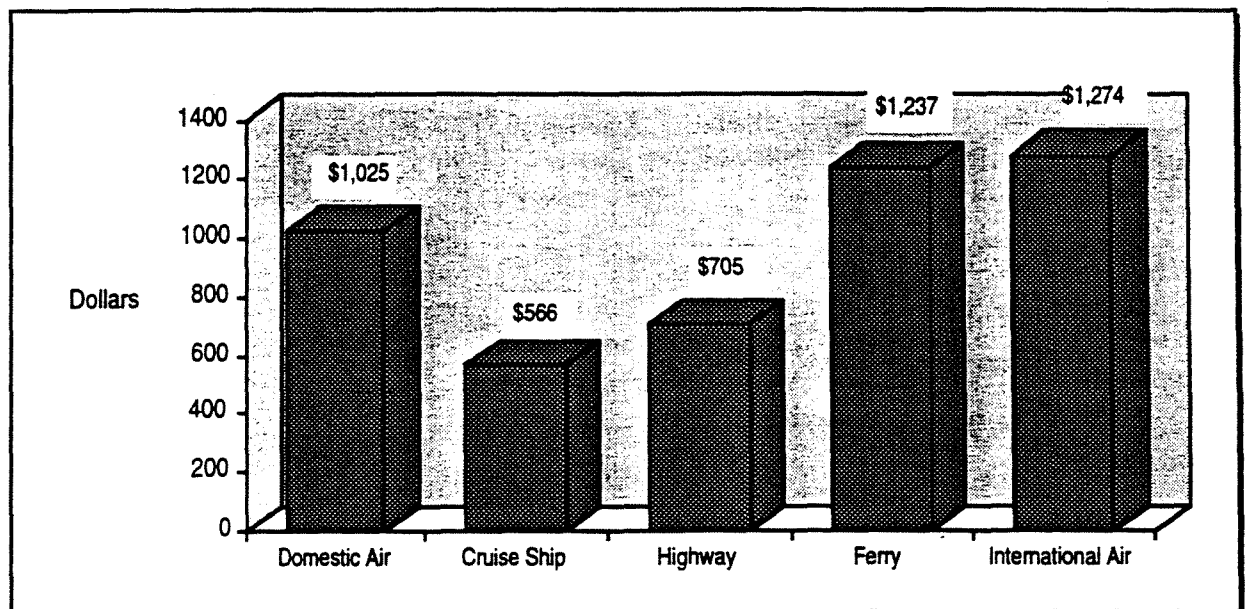
VP Ferry users spent the second highest amount per person per trip. The Transportation category claimed the most of the \$1,237 spent by Ferry users. Ferry transportation included transportation to and from the state via the Ferry contributing to the high expenditures in this category. Slightly more than \$200 per person was spent for Lodging. Food/Beverage, Tours/Recreation and the Gifts/Souvenir categories each claimed a sizable portion of Ferry user dollars.

Domestic Air VPs averaged \$1,025 per person per trip on their Alaska trip. Most expenditures fell in the Tours/Recreation, Lodging and Transportation categories.

Per person per trip expenditures dropped below \$1,000 for Highway mode users. Although Highway visitors spent significant amounts on Food/Beverage and Tours/Recreation, most Highway dollars were attributed to the Transportation category (\$194).

Graph III-D

**Average Instate Expenditures by Mode Use
Summer 1993 - Vacation/Pleasure Visitors
(Per Person - Per Trip)**



Understandably, Cruise Ship VP visitors spent the least per person per trip (\$566) for their Alaska trip. Many of their expenditures such as Lodging, Food and Transportation were already included in the packaged price of the trip.

Table III-E

**Average Instate Expenditures by Mode Use
Summer 1993 - Vacation/Pleasure Visitors
(Per Person - Per Trip)**

Expenditure Category	MODE USE				
	Domestic Air	Cruise Ship	Highway ¹	Ferry	International Air
Lodging	\$223	\$129	\$90	\$201	\$216
Transportation	183	94	194	490	257
Ground Transportation	96	76	3	49	98
Instate Air	28	15	6	15	77
Rental Car/RV	37	2	-	9	51
Personal Vehicle Expenses	13	1	90	64	12
Instate Ferry	9	-	94	351	14
Tours/Recreation	348	179	104	171	396
Day Tours/Salmon Bake	148	173	80	114	106
Overnight Instate Tours	182	3	7	38	205
Guide Service	3	-	-	-	61
Other Entertainment /Sports	15	3	17	19	24
Food/Beverage	106	39	119	175	162
In Eating Places	83	34	64	117	120
In Bars & Lounges	5	2	4	5	7
In Stores	17	3	51	54	34
Gifts/Souvenirs	119	100	90	125	139
Souvenir Clothing	29	32	29	36	23
Alaska Native Arts & Crafts	16	9	14	12	13
Other Alaska Made Arts & Crafts	22	6	5	12	7
All Other Gifts	52	-	43	65	97
Personal Expenses	12	5	21	20	31
Clothing	13	7	8	4	52
Business Expenses	-	-	-	-	-
Undistributed Expenses	21	13	79	51	22
Total Instate Expenditures	\$1,025	\$566	\$705	\$1,237	\$1,274

¹ Highway mode includes personal vehicle expenses only. Not included are Motorcoaches and trucks.

Expenditures of Vacation/Pleasure Visitors by Travel Type

Total Vacation/Pleasure Visitor Instate Expenditures by Travel Type

Inde-package visitors spent \$129 million in Alaska, or nearly 30% of all VP spending during Summer 1993. The expenditure categories most affected by Inde-package visitors were Tours/Recreation (\$56 million) and Transportation (\$26 million). Significant expenditures were captured by the Food/Beverage and Lodging categories as well.

Independent visitor spending totaled \$113 million. Once again Tours/Recreation, Transportation and Lodging garnered the most Independent VP visitor dollars.

VP Package visitors (58% of all VPs) spent \$224 million, or less than half of all VP spending. Cruise/Tour visitors spent the most (\$125 million) on their packaged trip. Round-trip Cruise, and Other Tour groups spent around \$40 million while in Alaska. Cruise Air visitors spent the least during their Alaska visit.

Graph III-E

**Total Instate Expenditures by Travel Type
Summer 1993 - Vacation/Pleasure Visitors
(In Millions of Dollars)**

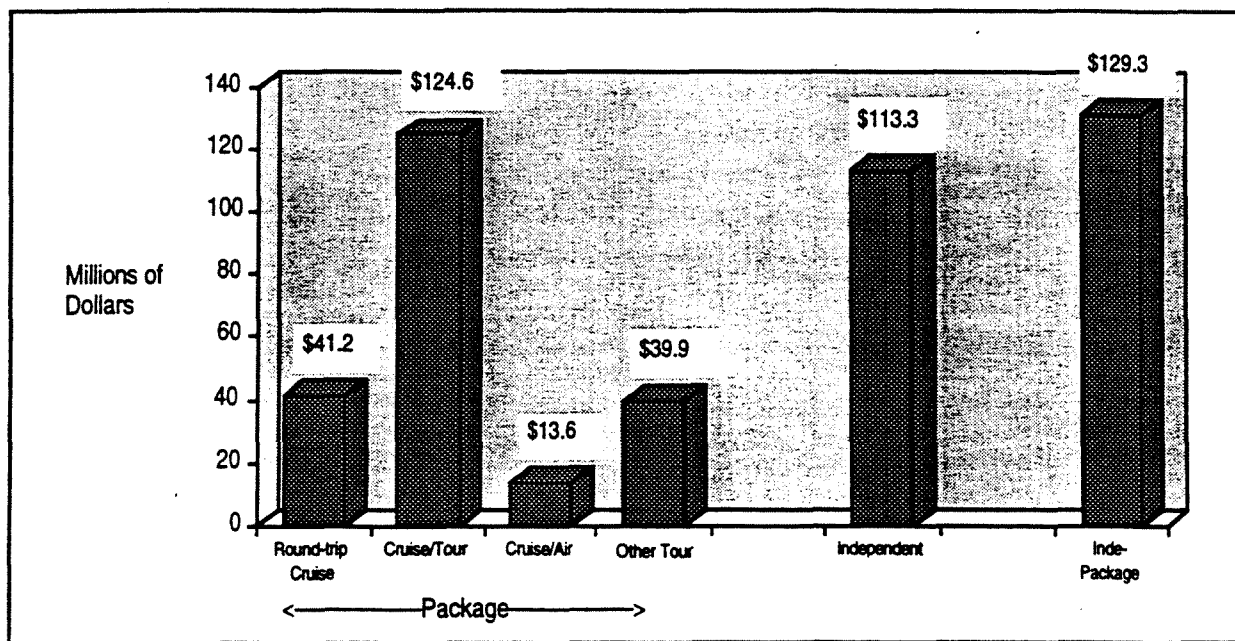


Table III-F

**Total Instate Expenditures by Travel Type
Summer 1993 - Vacation/Pleasure Visitors
(In Millions of Dollars)**

Expenditure Category	Package				Independent	Inde- Package ¹
	Round-trip Cruise	Cruise/ Tour	Cruise/ Air	Other Tour		
Lodging	\$ -	\$40.5	\$1.4	\$12.1	\$17.1	\$13.3
Transportation	0.1	29.6	0.9	8.2	21.9	25.5
Ground Transportation	0.1	24.5	0.6	4.9	1.2	1.3
Instate Air	-	4.9	-	2.0	2.0	1.7
Rental Car/RV	-	0.2	0.2	0.5	9.0	2.9
Personal Vehicle Expenses	<0.1	<0.1	0.1	0.2	5.6	8.0
Instate Ferry	-	-	-	0.6	3.9	11.6
Tours/Recreation	25.6	23.3	6.6	10.0	29.7	55.6
Day Tours/Salmon Bake	25.5	22.6	5.7	6.0	9.8	13.4
Overnight Instate Tours	-	-	0.8	1.8	16.3	39.7
Guide Service	-	-	-	1.9	-	-
Other Entertainment/Sports	0.1	0.6	0.1	0.4	3.6	2.5
Food/Beverage	0.8	10.7	0.8	3.8	17.9	15.6
In Eating Places	0.4	9.5	0.7	3.3	11.5	10.1
In Bars & Lounges	0.2	0.5	<0.1	0.2	1.1	0.4
In Stores	0.3	0.7	0.1	0.3	5.3	5.0
Gifts/Souvenirs	12.7	15.5	3.0	3.9	15.0	11.9
Souvenir Clothing	4.5	4.6	0.8	1.1	2.9	3.4
Alaska Native Arts & Crafts	1.3	1.0	0.5	0.7	2.6	1.5
Other Alaska Made Arts & Crafts	0.6	1.3	0.1	0.3	3.9	1.6
All Other Gifts	6.3	8.6	1.6	1.9	5.5	5.4
Personal Expenses	0.6	1.0	0.1	0.4	3.2	2.1
Clothing	0.9	0.9	0.5	0.4	2.5	0.8
Business Expenses	-	-	-	-	<0.1	<0.1
Undistributed Expenses	0.4	3.1	0.4	1.1	5.9	4.5
Total Instate Expenditures	\$41.2	\$124.6	\$13.6	\$39.9	\$113.3	\$129.3

¹ Inde-package visitors are independents who plan to purchase sightseeing tours during their trip.

Average Vacation/Pleasure Visitor Instate Expenditures by Travel Type

VP travel types displayed great variety in per person per trip spending patterns. Inde-package visitors spent more per person per trip than all other visitor groups, averaging \$1,179. The bulk of these expenditures were spent in the Tours/Recreation category.

Cruise/Tour, a part of the Package visitor group, came in second, averaging \$1,137 per person per trip. Most Cruise/Tour dollars went to Lodging followed by Transportation and Tours/Recreation. Other Tour trips followed averaging \$1,056. Similar to Cruise/Tour, the largest portion was spent on Lodging.

The remaining Package visitor groups, Round-trip Cruise and Cruise/Air, spent much less per person per trip. The greatest portion of their per person per trip dollars were expended in the Tours/Recreation category.

Independent visitor per person per trip expenditures averaged \$827. Once again the majority of visitor spending was in the Tours/Recreation category.

Graph III-F

**Average Instate Expenditures by Travel Type
Summer 1993 - Vacation/Pleasure Visitors
(Per Person - Per Trip)**

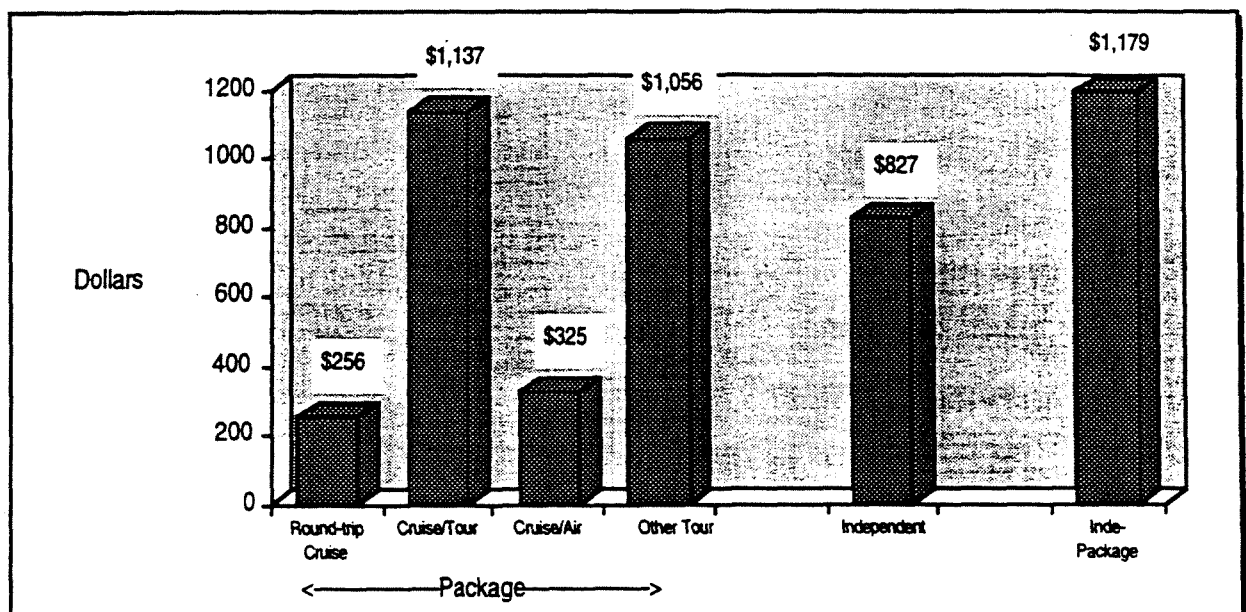


Table III-G

Average Instate Expenditures by Travel Type
Summer 1993 - Vacation/Pleasure Visitors
(Per Person/Per Trip)

Expenditure Category	Package				Independent	Inde-Package ¹
	Round-trip Cruise	Cruise/Tour	Cruise/Air	Other Tour		
Lodging	\$ -	\$370	\$33	\$320	\$125	\$121
Transportation	-	271	21	216	160	233
Ground Transportation	-	224	14	129	9	11
Instate Air	-	45	-	54	15	16
Rental Car/RV	-	1	5	13	66	26
Personal Vehicle Expenses	-	-	2	4	41	73
Instate Ferry	-	-	-	17	29	106
Tours/Recreation	160	213	159	266	217	507
Day Tours/Salmon Bake	159	207	136	158	71	122
Overnight Instate Tours	-	-	20	48	119	362
Guide Service	-	-	-	50	-	-
Other Entertainment/Sports	1	6	2	10	26	23
Food/Beverage	5	97	19	101	131	142
In Eating Places	3	87	17	88	84	92
In Bars & Lounges	1	4	1	6	8	4
In Stores	2	6	1	7	39	46
Gifts/Souvenirs	79	141	72	104	110	108
Souvenir Clothing	28	42	19	29	21	31
Alaska Native Arts & Crafts	8	9	13	18	19	14
Other Alaska Made Arts & Crafts	4	12	2	7	28	15
All Other Gifts	39	78	38	50	40	49
Personal Expenses	4	9	2	11	23	19
Clothing	6	8	11	10	18	8
Business Expenses	-	-	-	-	-	-
Undistributed Expenses	3	28	8	29	43	41
Total Instate Expenditures	\$256	\$1,137	\$325	\$1,056	\$827	\$1,179

¹ Inde-package visitors are Independents who plan to purchase sightseeing tours during their trip.

Expenditures of Vacation/Pleasure Visitors by Origin

Total Vacation/Pleasure Instate Expenditures by Origin

Most Vacation/Pleasure (VP) visitors to Alaska (80%) hailed from the United States, leaving behind 85% of total VP Summer 1993 expenditures. The two regions with the greatest spending impacts to Alaska were the West and the South. Nearly one-third of summer VPs came from the western United States accounting for 23% of total VP spending. VP visitors from the southern region of the United States were 21% of all VPs yet spending slightly more (23% or \$108 million) than western visitors to Alaska.

The other U.S. regions that contributed to Alaska's economy were the Midwest and the East. Nearly two of ten VPs to Alaska were from the Midwest and spent 20% of all VP instate expenditures. Eastern visitors comprised 12% of all VP visitors and contributed 18% of all visitor instate spending to Alaska.

Overseas visitors though a small proportion of Alaska's total visitors (8%) contributed greatly to Alaska's economy. Total instate expenditures by Overseas visitors were \$50 million (11% of visitor spending). Europeans, accounting for 5% of Alaska's visitors, spent heavily. Much of Europe's visitor spending (\$21 million) can be attributed to VPs from Germany, Switzerland and Austria.

Visitors from the Pacific Region comprised 2% of all VPs and spent over \$21 million. Australia/New Zealand visitors, although only 1% of the total VP population, contributed 2% of total VP expenditures to Alaska.

Canadian visitors comprised 12% of the total VP population and accounted for only 4% of total VP summer spending. This could be attributed to the short length of stay of Canadian visitors. Canadian visitors averaged six nights while in Alaska. U.S. visitors averaged nine nights and Overseas visitors, fourteen nights.

The main source of U.S. VP instate dollars was Tours/Recreation. Lodging and Transportation were the second and third most important expenditure categories for Western, Southern and Midwest visitors.

Overseas VPs spent the greatest portion of their instate dollars on Tours/Recreation followed by Transportation and Lodging. European visitors, on the other hand, spent more than one-quarter of their instate expenditures on Transportation and Tours/Recreation. VPs hailing from Germany, Switzerland and Austria spent the most on Transportation, primarily on rental car/RV expenses. Pacific region VPs were more likely to spend the bulk of their instate dollars on Tours/Recreation.

**Total Instate Expenditures by Origin
Summer 1993 - Vacation/Pleasure Visitors
(In Millions of Dollars)**

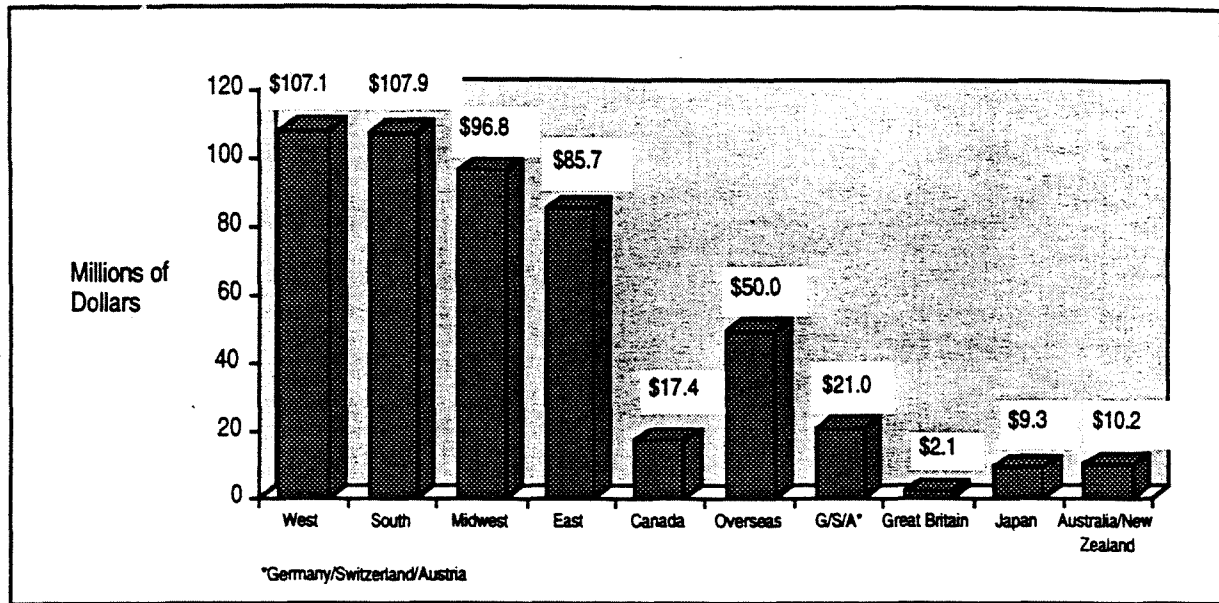


Table III-H

Total Instate Expenditures by U.S. Origin
Summer 1993 - Vacation/Pleasure Visitors
(In Millions of Dollars)

Expenditure Category	← West →			← South →			Mid- west	East
	Total	CA	WA	Total	FLA	TEX		
Lodging	\$12.5	\$5.9	\$1.7	\$22.8	\$4.0	\$3.8	\$23.1	\$15.0
Transportation	18.8	8.5	2.5	18.2	4.0	3.3	21.5	12.6
Ground Transportation	4.2	1.9	0.5	7.6	1.3	1.1	10.1	7.1
Instate Air	2.9	1.8	0.5	2.4	0.9	0.8	1.8	1.5
Rental Car/RV	1.3	0.4	0.2	3.2	0.4	0.4	2.7	1.9
Personal Vehicle Expenses	4.0	1.4	0.5	2.8	0.8	0.8	4.0	0.7
Instate Ferry	6.4	3.1	0.9	2.1	0.7	0.2	2.8	1.3
Tours/Recreation	42.4	15.8	8.4	35.3	6.1	14.1	24.5	31.6
Day Tours/Salmon Bakes	20.0	10.2	2.1	22.1	5.5	4.7	16.3	13.0
Overnight Instate Tours	20.5	5.1	6.1	12.0	0.5	9.0	6.7	16.4
Guide Service	-	-	-	-	-	-	-	0.8
Other Entertainment/Sports	1.9	0.4	0.3	1.2	0.1	0.4	1.6	1.4
Food/Beverage	12.3	3.6	2.3	11.0	1.8	2.1	10.4	7.4
In Eating Places	8.0	2.5	1.5	8.7	1.4	1.3	7.6	6.2
In Bars & Lounges	0.6	0.2	0.2	0.6	<0.1	0.3	0.4	0.2
In Stores	3.7	0.9	0.6	1.7	0.4	0.5	2.3	1.0
Gifts/Souvenirs	12.3	5.2	2.5	14.9	4.1	2.4	13.1	13.9
Souvenir Clothing	3.5	1.6	0.5	3.4	0.7	0.8	4.4	3.8
Alaska Native Arts & Crafts	1.5	0.8	0.2	2.0	0.2	0.1	1.6	1.4
Other Alaska Made Arts & Crafts	0.8	0.2	0.1	2.1	1.1	0.2	1.1	3.9
All Other Gifts	6.5	2.7	1.7	7.4	2.0	1.3	6.0	4.8
Personal Expenses	2.3	0.5	0.3	1.2	0.2	0.3	1.2	1.5
Clothing	1.0	0.3	0.1	1.0	0.1	0.5	0.6	1.7
Business Expenses	<0.1	-	<0.1	-	-	-	-	-
Undistributed Expenses	5.4	1.9	0.5	3.4	1.8	1.1	2.4	1.4
Total Instate Expenditures	\$107.1	\$41.9	\$18.3	\$107.9	\$22.1	\$27.7	\$96.8	\$85.7

Table III-I

Total Instate Expenditures by Foreign Origin
Summer 1993 - Vacation/Pleasure Visitors
(In Millions of Dollars)

Expenditure Category	Canada	Over-seas	←—Europe—→			←—Pacific Region—→		
			Total	G/S/A ¹	Britain	Total	Japan	Australia/ New Zealand
Lodging	\$1.6	\$9.2	\$4.0	\$2.6	\$0.3	\$5.0	\$2.1	\$2.7
Transportation	4.2	11.0	7.1	6.4	0.2	3.6	1.7	1.5
Ground Transportation	0.3	3.3	0.8	0.7	<0.1	2.3	1.1	1.1
Instate Air	—	1.8	0.9	0.8	—	1.0	0.4	0.2
Rental Car/RV	0.1	3.7	3.5	3.5	—	0.2	0.2	<0.1
Personal Vehicle Expenses	1.4	1.0	0.9	0.7	<0.1	<0.1	<0.1	<0.1
Instate Ferry	2.4	1.2	1.1	0.6	0.2	0.1	—	0.1
Tours/Recreation	5.0	14.1	7.2	5.5	1.1	6.6	2.5	3.9
Day Tours/Salmon Bake	4.8	7.2	2.8	1.2	1.0	4.1	1.1	2.8
Overnight Instate Tours	—	5.6	3.3	3.2	0.1	2.3	1.2	1.0
Guide Service	—	0.3	0.2	0.2	—	0.1	0.1	—
Other Entertainment/Sports	0.2	1.1	1.0	0.9	<0.1	0.1	0.1	<0.1
Food/Beverage	2.2	6.4	3.8	2.9	0.2	2.4	1.0	1.3
In Eating Places	1.0	4.2	2.0	1.3	0.1	2.1	0.9	1.1
In Bars & Lounges	0.2	0.4	0.2	0.1	<0.1	0.2	<0.1	0.2
In Stores	1.0	1.8	1.6	1.5	<0.1	0.1	0.1	<0.1
Gifts/Souvenirs	2.9	5.7	2.3	1.5	0.3	3.1	1.6	0.8
Souvenir Clothing	1.2	1.0	0.4	0.3	0.1	0.5	0.3	0.1
Alaska Native Arts & Crafts	0.3	1.1	0.5	0.2	<0.1	0.5	0.4	<0.1
Other Alaska Made Arts & Crafts	0.1	0.2	0.2	0.2	<0.1	0.1	0.1	<0.1
All Other Gifts	1.3	3.3	1.2	0.8	0.2	2.0	0.8	0.7
Personal Expenses	0.3	0.9	0.6	0.5	<0.1	0.3	0.1	<0.1
Clothing	0.3	1.4	1.1	1.1	<0.1	0.2	0.2	<0.1
Business Expenses	—	<0.1	<0.1	—	—	—	—	—
Undistributed Expenses	0.9	1.3	1.2	0.4	—	0.1	0.1	—
Total Instate Expenditures	\$17.4	\$50.0	\$27.3	\$21.0	\$2.1	\$21.3	\$9.3	\$10.2

¹ Germany/Switzerland/Austria

Average Vacation/Pleasure Visitor Instate Expenditures by Origin

Spending patterns varied among VP visitors to Alaska depending on the visitor's origin. Overseas visitors tended to spend more per person per trip on average. Visitors from the Pacific region countries of Japan and Australia/New Zealand led in the per person per trip spending. Japanese visitors averaged a high of \$1,555, nearly two times the overall VP per person per trip average.

European visitors were also big spenders. German/Swiss/Austrian visitors spent \$1,077, more than the average U.S. visitor. Visitors hailing from Great Britain spent much less than most Overseas visitors.

Among US visitors, Easterners spent more per person per trip than Overseas visitors, averaging \$1,068. The second highest U.S. per person per trip expenditure average came from the Midwest, nearly two hundred dollars lower than the Eastern average. The South was a close third averaging \$847 per person per trip.

The region with the lowest average expenditures per person was the West. Washington visitors were high repeat visitors. It is possible they traveled more frequently and spent less, while visitors who traveled greater distances visited Alaska less frequently and tended to spend more on their trip.

Canadian visitors, though numerous, spent much less per person than any other group of visitors. Canadian visitors spent little time traveling in Alaska, contributing to the low per person per trip figure. Also, travel across the Canadian border at Beaver Creek and on the Klondike Highway in Skagway, frequently included Canadians visiting Alaska for the day. They drove into either Tok or Skagway and purchased relatively inexpensive items such as gas and groceries or stopped off at a restaurant.

Most instate per person per trip expenditures by U.S. visitors occurred in the Tours/Recreation category. The proportion of visitor spending devoted to Tours/Recreation ranged between 39% for Western visitors, and 25% for Midwest visitors.

Visitors from foreign origins were more likely to spend the greatest proportion of per person per trip expenditures on Tours/Recreation. This was true for Canadian and Pacific Region visitors. European visitors, were more likely to spend slightly more on Transportation

**Average Instate Expenditures by Origin
Summer 1993 - Vacation/Pleasure Visitors
(Per Person - Per Trip)**

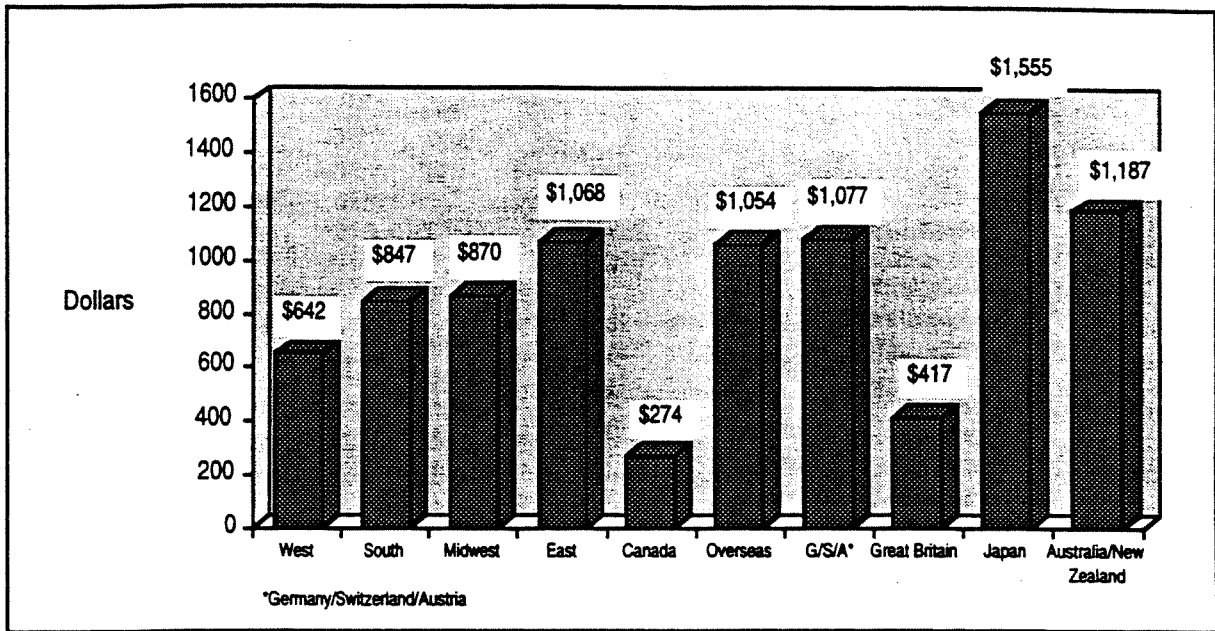


Table III-J

Average Instate Expenditures by U.S. Origin
Summer 1993 - Vacation/Pleasure Visitors
 (Per Person - Per Trip)

Expenditure Category	West			South			Mid-west	East
	Total	CA	WA	Total	FLA	TEX		
Lodging	\$75	\$86	\$46	\$179	\$135	\$144	\$208	\$187
Transportation	113	124	70	143	136	128	193	157
Ground Transportation	25	27	13	60	45	44	91	88
Instate Air	17	27	14	19	30	29	16	19
Rental Car/RV	8	6	4	25	12	17	24	24
Personal Vehicle Expenses	24	20	13	22	26	29	36	9
Instate Ferry	38	44	24	17	23	8	26	17
Tours/Recreation	254	230	234	277	209	540	220	394
Day Tours/Salmon Bakes	120	149	59	173	186	179	146	162
Overnight Instate Tours	123	75	168	95	18	346	60	204
Guide Service	-	-	-	-	-	-	-	10
Other Entertainment/Sports	11	6	7	9	5	16	14	18
Food/Beverage	74	53	63	86	61	80	93	93
In Eating Places	48	37	40	68	48	49	69	77
In Bars & Lounges	4	2	5	5	1	12	4	3
In Stores	22	13	17	13	12	19	21	13
Gifts/Souvenirs	74	76	69	117	140	93	118	174
Souvenir Clothing	21	23	14	26	25	30	39	48
Alaska Native Arts & Crafts	9	11	4	15	7	5	14	17
Other Alaska Made Arts & Crafts	5	3	4	17	38	8	9	49
All Other Gifts	39	39	47	58	70	51	54	60
Personal Expenses	14	8	9	10	6	13	10	18
Clothing	6	5	3	8	5	21	6	21
Business Expenses	-	-	-	-	-	-	-	-
Undistributed Expenses	32	28	13	27	61	41	22	18
Total Instate Expenditures	\$642	\$609	\$507	\$847	\$752	\$1,060	\$870	\$1,068

Table III-K

Average Instate Expenditures by Foreign Origin
Summer 1993 - Vacation/Pleasure Visitors
 (Per Person - Per Trip)

Expenditure Category	Canada	Over-seas	←Europe→			←Pacific Region→		
			Total	G/S/A ¹	Britain	Total	Japan	Australia/ New Zealand
Lodging	\$25	\$194	\$134	\$133	\$62	\$311	\$349	\$314
Transportation	65	231	241	329	39	222	278	176
Ground Transportation	5	69	25	35	4	141	176	133
Instate Air	—	38	29	43	—	59	74	21
Rental Car/RV	1	77	117	177	—	12	26	5
Personal Vehicle Expenses	22	21	32	37	3	2	2	2
Instate Ferry	37	25	36	33	32	8	—	15
Tours/Recreation	78	298	243	282	220	413	424	449
Day Tours/Salmon Bake	75	151	93	61	205	256	190	327
Overnight Instate Tours	—	117	111	165	13	142	205	116
Guide Service	—	7	7	11	—	6	16	—
Other Entertainment/Sports	3	23	32	44	2	9	13	6
Food/Beverage	35	136	128	150	30	152	168	148
In Eating Places	16	89	66	67	23	131	150	124
In Bars & Lounges	3	8	7	7	1	12	3	20
In Stores	16	38	55	76	6	9	15	4
Gifts/Souvenirs	46	120	77	79	58	190	264	95
Souvenir Clothing	19	21	15	16	12	29	54	14
Alaska Native Arts & Crafts	4	23	16	13	5	33	67	—
Other Alaska Made Arts & Crafts	2	5	6	8	2	4	9	2
All Other Gifts	21	70	40	42	39	123	133	79
Personal Expenses	5	19	20	26	7	17	24	2
Clothing	5	29	37	56	1	15	37	2
Business Expenses	—	—	—	—	—	—	—	—
Undistributed Expenses	14	28	42	22	—	5	12	—
Total Instate Expenditures	\$274	\$1,054	\$921	\$1,077	\$417	\$1,324	\$1,555	\$1,187

¹ Germany/Switzerland/Austria

Expenditures of Vacation/Pleasure Visitors by Region

Total Vacation/Pleasure Visitor Instate Expenditures by Region

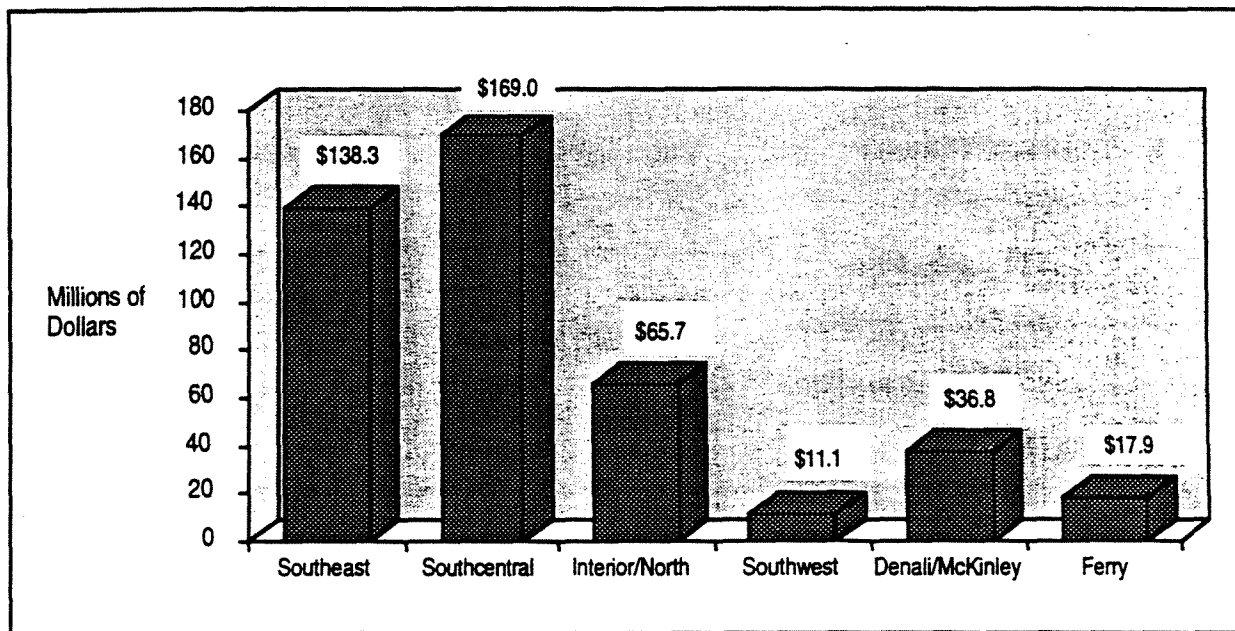
Each of Alaska's five regions as well as the State Ferry system garnered sizable portions from Summer VPs. The Southcentral region received the largest portion (36%) of instate visitor dollars. The Southeast region was a close second earning 30% of all VP visitor dollars. The Interior/North region received 14% of all VP dollars followed by Denali/McKinley (8%). Ferry (4%) and Southwest (2%) claimed the fewest of VP expenditures.

Southcentral regional spending was spread evenly among the top three expenditure categories. Tours/Recreation and Lodging were nearly equal accounting for one-quarter each of all VP spending. Transportation expenditures were slightly lower at 21% of all Southcentral visitor expenditures.

Southeastern VP expenditure patterns were more pronounced than those of Southcentral visitors. Tours/Recreation was the top expenditure category claiming more than half of all Southeast VP dollars. Gifts/Souvenirs came in second claiming one-quarter of VP instate spending. Unlike Southcentral, the third category of expenditures for Southeast visitors was Lodging claiming 8%.

Graph III-I

**Total Instate Expenditures by Region
Summer 1993 - Vacation/Pleasure Visitors
(In Millions of Dollars)**



Interior/North VP dollars were first spent on Lodging, followed by Transportation and Food/Beverage. VP dollars in the Southwest were spent overwhelming on Tours/Recreation followed by Lodging and Transportation. Denali/McKinley VPs spent almost equal amounts on Lodging and Tours/Recreation.

Ferry expenditures were mostly devoted to Transportation, Food/Beverage and Lodging.

Table III-L

**Total Instate Expenditures by Region
Summer 1993 - Vacation/Pleasure Visitors
(In Millions of Dollars)**

Expenditure Category	South-east	South-central	Interior/North	South-west	Denali/McKinley	Instate Ferry
Lodging	\$10.8	\$41.9	\$20.4	\$0.7	\$10.2	\$0.6
Transportation	7.4	35.9	16.7	0.5	9.9	16.0
Ground Transportation	3.2	11.6	8.0	<0.1	9.7	-
Instate Air	1.7	4.2	4.3	0.4	-	-
Rental Car/RV	0.8	11.9	0.2	-	-	-
Personal Vehicle Expenses	1.4	8.0	4.2	<0.1	0.2	-
Instate Ferry	0.2	<0.1	-	-	-	16.0
Tours/Recreation	70.2	42.8	8.3	9.4	10.3	-
Day Tours/Salmon Bake	48.8	21.1	6.2	<0.1	7.2	-
Overnight Instate Tours	20.0	16.3	1.3	8.2	2.5	-
Guide Service	-	0.9	-	1.0	-	-
Other Entertainment/Sports	1.4	4.6	0.8	0.1	0.5	-
Food/Beverage	10.6	24.7	9.7	0.4	3.4	1.2
In Eating Places	7.4	17.2	6.8	0.4	3.0	1.1
In Bars & Lounges	1.0	1.0	0.3	<0.1	<0.1	0.1
In Stores	2.2	6.5	2.5	<0.1	0.3	<0.1
Gifts/Souvenirs	34.4	16.1	9.5	0.1	2.8	0.1
Souvenir Clothing	9.5	5.0	2.1	<0.1	0.7	<0.1
Alaska Native Arts & Crafts	3.4	2.5	1.7	-	0.2	-
Other Alaska Made Arts & Crafts	5.8	0.9	1.3	<0.1	0.3	<0.1
All Other Gifts	15.7	7.7	4.4	<0.1	1.5	0.1
Personal Expenses	2.6	3.7	0.8	0.1	0.2	0.1
Clothing	1.9	3.7	0.3	<0.1	0.1	-
Business Expenses	-	-	-	-	<0.1	-
Undistributed Expenses	0.5	-	-	-	-	-
Total Instate Expenditures	\$138.3	\$169.0	\$65.7	\$11.1	\$36.8	\$17.9

Average Vacation/Pleasure Visitor Instate Expenditures by Region

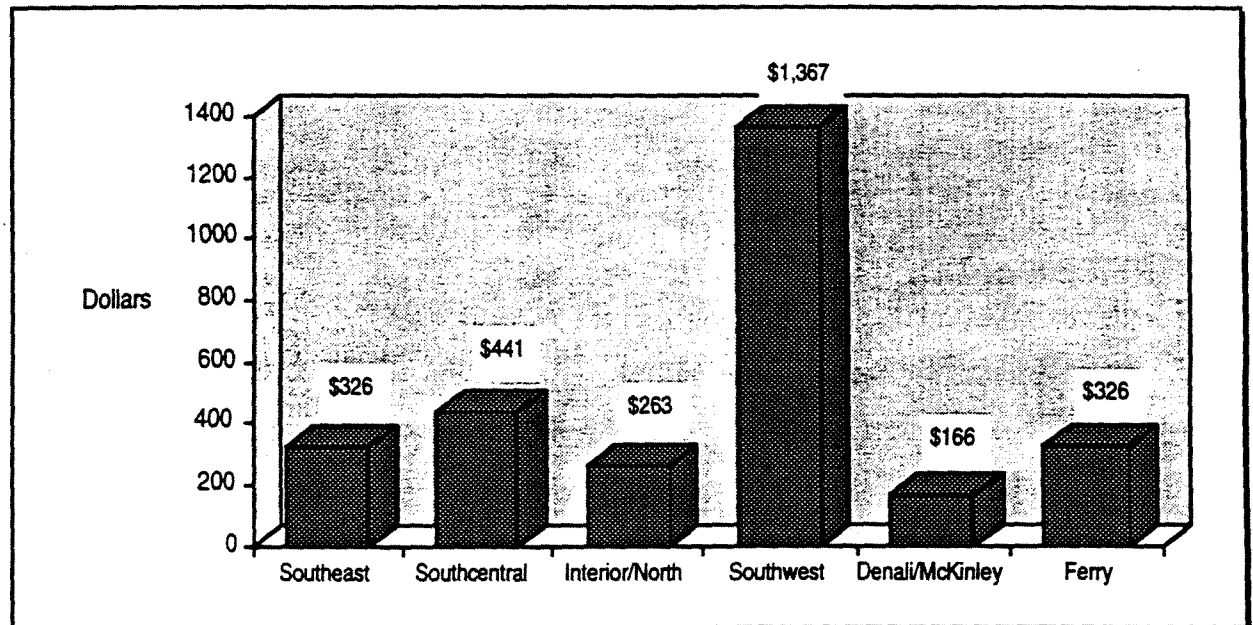
Instate per person per trip expenditures by VP visitors varied depending on the Alaska region. Expenditures by VPs to the Southwest far exceeded those of all other regions, averaging \$1,367 per person per trip. The greatest portion of Southwest visitor dollars (\$1,152 or 84%) was spent on Tours/Recreation, particularly overnight instate tours. Southwest is home to a number of exclusive fishing and wilderness lodges, the probable recipients of these visitor dollars.

Southcentral VP visitors averaged \$441 per person per trip. Tours/Recreation and Lodging garnered one-quarter of Southcentral per person per trip expenditures (\$112 and \$109 respectively). Southeast VP per person per trip expenditure patterns were similar to those of Southcentral with Tours/Recreation attracting the most visitor dollars. However, more than half of Southeast visitor expenditures went to Tours/Recreation.

VP visitors to the Interior/North region averaged \$263 per person per trip. Lodging accounted for nearly one-third and Transportation claimed one-quarter of the total. VPs to the Interior spent similar amounts in the Tours/Recreation, Food/Beverage and Gifts/Souvenirs categories.

Graph III-J

**Average Instate Expenditures by Region
Summer 1993 - Vacation/Pleasure Visitors
(Per Person - Per Trip)**



Denali/McKinley VP visitors averaged \$166 per person per trip primarily spending on Lodging, Transportation and Tours/Recreation.

Ferry at Sea visitors spent the greatest portion of their per person per trip expenditures (88%) on Transportation. Food was also an important expenditure category for VPs on the Ferry as was the purchase of Lodging (staterooms) aboard the vessels.

Table III-M

**Average Instate Expenditures by Region
Summer 1993 - Vacation/Pleasure Visitors
(Per Person/Per Trip)**

Expenditure Category	South-east	South-central	Interior/North	South-west	Denali/McKinley	Instate Ferry
Lodging	\$25	\$109	\$81	\$87	\$46	\$12
Transportation	17	94	67	59	45	290
Ground Transportation	8	30	32	2	43	-
Instate Air	4	11	17	54	-	-
Rental Car/RV	2	31	1	-	-	-
Personal Vehicle Expenses	3	21	17	3	1	-
Instate Ferry	-	-	-	-	-	290
Tours/Recreation	165	112	33	1,152	46	-
Day Tours/Salmon Bake	115	55	25	5	33	-
Overnight Instate Tours	47	43	5	1,011	11	-
Guide Service	-	2	-	120	-	-
Other Entertainment/Sports	3	12	3	16	2	-
Food/Beverage	25	65	39	54	15	21
In Eating Places	17	45	27	46	14	20
In Bars & Lounges	2	3	1	5	-	1
In Stores	5	17	10	3	1	-
Gifts/Souvenirs	81	42	38	8	12	1
Souvenir Clothing	22	13	9	2	3	-
Alaska Native Arts & Crafts	8	6	7	-	1	-
Other Alaska Made Arts & Crafts	14	2	5	-	1	-
All Other Gifts	37	20	18	6	7	1
Personal Expenses	6	10	3	6	1	1
Clothing	4	10	1	1	1	-
Business Expenses	-	-	-	-	-	-
Undistributed Expenses	1	-	-	-	-	-
Total Instate Expenditures	\$326	\$441	\$263	\$1,367	\$166	\$326

Chapter IV: Prepaid and Instate Tour Information

Total Expenditures by Alaska Visitors

Instate and Out-of-State Expenditures

Instate Tours



Total Expenditures by Alaska Visitors

Instate expenditure data provides valuable financial information used to gauge tourism's impact on the State's economy. The true value of Alaska tourism is more accurately portrayed combining both instate expenditures and other out-of-state Alaska trip expenditures. The total spent to, from and within Alaska exceeded \$1.4 billion dollars in Summer 1993. Excluded from this amount are in-transit out-of-state expenses by Highway personal vehicle visitors.

The proportion of overall trip expenditures spent inside Alaska is on the rise. Instate expenditures, \$598 million, were 42% of total Alaska trip expenditures in summer 1993. This is a 5% increase over Summer 1989 when instate expenditures were 37% of total Alaska trip expenditures. Alaska received economic benefits from tourism other than consumer spending. The benefits received from instate employment and payroll, operating expenses and capital investments are available in another tourism study, *Alaska's Visitor Industry: An Economic Profile* available through the State of Alaska Division of Tourism.

Package visitor expenditures were more likely to be spent out of Alaska than instate. Most of the \$666 million spent outside Alaska was dedicated to cruise ship fares or air fares that took them to their port of origin prior to beginning the cruise.

Independent visitor expenditures were mostly spent instate. More than 80% of Inde-Package visitor spending occurred inside Alaska. Independent visitor expenditures were at 60%. Independent visitors spent \$165 million getting to or leaving Alaska. Commercial transportation numbers exclude Ferry to/from Alaska which is included with instate revenue totals since all Ferry expenditures return to State of Alaska coffers.

Table IV-A

Instate and Out-of-State Alaska Trip Expenditures Summer 1993 - By All Visitors (In Millions of Dollars)

	Instate Expenditures	Out-of-State Alaska Trip Expenditures	Total
Package	\$229.4	\$666.0	\$895.4
Independent Total	368.5	165.1	533.6
Independent	196.5	127.2	323.7
Inde-Package ¹	174.1	37.9	212.0
Total	\$597.9	\$831.1	\$1,429.0

¹ Inde-Package visitors are Independents who plan to purchase sightseeing tours during their stay.

Instate and Out-of-State Alaska Trip Expenditures by Trip/Visitor Characteristic

A visitor to Alaska spends money both inside and outside the State on their Alaska trip. Typical outside Alaska costs include air and cruise fares to and from the state.

International Air visitors deposited the largest number of dollars per person (\$1,384) in the state economy, however they spent a (53%) sizable portion of their total trip dollars prior to entering the State. The majority of State Ferry visitor expenditures (84%) were spent inside Alaska. State Ferry visitors spent a healthy \$1,183 per person per trip instate. Ferry visitor expenditures also included transportation to and from Alaska given that all Ferry revenues accrue to the State. Domestic Air visitor instate expenditures averaged \$820 per person per trip, slightly less than the amount expended getting to and from Alaska. Cruise visitors spent the greater portion of their Alaska trip dollars outside (78%) Alaska.

Business and Pleasure visitors spent the most per person per trip instate, \$905. Vacation/Pleasure visitors averaged the second highest amount per person per trip (\$780), but spent the largest amount outside the state. VFRs were more balanced in their instate and-out-of state split spending slightly over half of their Alaska trip dollars (54%) instate.

Package visitors were more likely to have spent the greater portion of their per person per trip expenditures going to and from Alaska, particularly Round-trip Cruise visitors. Most of this amount can be attributed to cruise ship fares paid by the Cruise/Tour, Cruise/Air and Round-trip Cruise visitors. Other package tour groups spent more evenly between instate (42%) and other out-of-state (58%) expenditures.

Independent visitors were more likely to spend a greater portion of their visitor dollars inside Alaska rather than on travel to and from Alaska. Among Independent visitors, VPs left the largest portion of per person per trip expenditures (78%) in Alaska. This was true for Inde-package VPs as well.

Inde-package visitors spent the bulk of visitor dollars inside Alaska. VP visitors left the greatest portion (84%) of their Alaska trip dollars inside the State. BP Inde-package visitors also spent a great deal inside Alaska.

Table IV-B

**Instate and Out-of-State Alaska Trip Expenditures by Trip/Visitor Characteristics
Summer 1993 - By All Visitors
(Per Person - Per Trip)**

Trip/Visitor Characteristics	Instate Expenditures	Out-of-State Alaska Trip Expenditures	Total
Entry Mode			
Domestic Air	\$820	\$849	\$1,669
Cruise Ship	484	1,722	2,206
Highway ¹	596	NR	NR ²
Ferry	1,183	233	1,416
International Air	1,384	1,541	2,925
Trip Purpose			
Vacation/Pleasure	\$780	\$1,192	\$1,972
Visiting Friends/Relatives	419	360	779
Business/Pleasure	905	574	1,479
Business Only	399	634	1,033
Travel Type			
Package Total	\$633	\$1,843	\$2,476
Round-Trip Cruise	255	1,506	1,761
Cruise/Tour	1,145	2,562	3,707
Cruise/Air	325	1,746	2,071
Other Package Tour	1,031	1,438	2,469
Independent			
Vacation/Pleasure	\$827	\$238	\$1,065
Visiting Friends/Relatives	341	382	723
Business/Pleasure	642	485	1,127
Business/Only	401	639	1,040
Inde-Package³			
Vacation/Pleasure	\$1,179	\$226	\$1,405
Visiting Friends/Relatives	793	160	953
Business/Pleasure	1,816	657	2,473
Business Only ⁴	-	-	-

¹ Highway mode includes personal vehicle expenses only. Not included are Motorcoaches and trucks.
² Not recorded in the Diary.
³ Inde-Package visitors are independents who plan to purchase sightseeing tours during their trip.
⁴ The sample size was too small for analysis.

Instate Tours by Tour Type

Instate Tour Volume

The 836,900 Summer visitors to Alaska purchased an overwhelming 1,328,425 instate tours. These purchases included day tours as well as overnight tours. Similar to past years, most of the tours purchased (95%) fell into the Day Tours/Salmon Bakes category.

The day tour leading in popularity was the Area City Tour provided in nearly all the major tourism destinations in Alaska. More than one-third of summer day tours purchased was a city tour. Many city tours are reasonably priced and well within the means of most visitors to Alaska.

Day cruises were second in popularity attracting 178,000 visitors. The third most popular day tour was flightseeing purchased by 174,000 visitors. Though more costly than other tours, flightseeing is often a once in a lifetime experience for many and has great value for those selecting this tour option.

Other day tours enjoyed by many visitors to Alaska included; river trips purchased by 103,000; salmon bakes, sold to 88,800; guided fishing trips taken by 87,700 and train trips used by 85,600 summer visitors.

Overnight instate tours included a variety of tour options. Tour lengths varied between single night options to four or more nights. Overnight tour options that lasted four or more nights were the most popular purchased by nearly 32,000 visitors. Most of the four or more overnight tours (29% or 9,500) were sold to travelers visiting fishing lodges. Wilderness fishing appealed to 7,124 summer visitors.

One night/two day tours were also very popular attracting 19,334 purchasers. Area Tours that included overnights on land appealed to the majority (64%) of these visitors. Among one night/two day tours lodge visits and fishing lodge tours were sold to 19% and 14% respectively.

Three night/four day and two night/three day tour options were popular among 6,600 and 5,200 visitors respectively. Once again Area Tours with overnight stays on land was the most popular tour type. Within the three night/four day tour options, fishing lodges attracted the second largest group of visitors. For two night/three day tour options, overnight cruises was the second most popular tour type.

Table IV-C

Instate Tours by Tour Type Summer 1993 - All Visitors

Tour Type	Number of Tours Sold
Day Tours/Salmon Bakes	1,264,961
Area City Tours	443,846
Day Cruises	178,343
Flightseeing	174,099
River Trips	103,262
Salmon Bakes	88,801
Guided Fishing	87,669
Train Trips	85,651
Shows and Entertainment	37,198
Alaska Cultural Shows	6,370
Unknown	9,083
Other	50,639
One Night/Two Day	19,334
Overnight Cruises	313
Fishing - Lodge	2,754
Fishing by Boat	158
Other Lodge	3,797
Area Tours (with overnights on land)	12,312
Two Nights/Three Days	5,279
Overnight Cruises	1,191
Fishing by Boat	937
Area Tours (with overnights on land)	2,388
Other	793
Three Nights/Four Days	6,622
Fishing - Lodge	1,093
Other Lodge	736
Area Tours (with overnights on land)	3,791
Other	1,002
Four or More Nights	32,229
Overnight Cruises	3,485
Fishing - Lodge	9,497
Other Lodge	2,287
Wilderness Fishing	7,124
Area Tours (with overnights on land)	4,194
Adventure Tours	1,208
Elderhostel	1,603
Other	2,831
Total Instate Tours Purchased	1,328,425

Instate Tour Purchasing Patterns

Tour type purchases varied among the various visitor groups depending on trip characteristics such as trip purpose, entry mode and travel type as well as visitor characteristics such as origin.

Vacation/Pleasure (VP) visitors bought the bulk of all tour types, purchasing 100% of the two night/three day tours and over ninety percent of day tours. Likewise they purchased the greatest portion of one night/two day and three night/ four day tours. Eight of ten tours lasting four or more nights were purchased by VPs. VFRs and BPs were in the market for tours that were four or more nights in length also.

Among BPs 15% purchased three night/four day tours seeking a little pleasure on their Alaska trip. When Business Only visitors found some time to take a tour they usually selected a day tour.

Day tours were popular among visitors arriving by Cruise ship and Domestic Air. More than half of the day tours were purchased by Cruise visitors. More than a third of day tours were purchased by visitors arriving by Domestic Air. The majority of instate overnight tours were also purchased by Domestic Air visitors. The remaining portion of day tours (13%) were purchased by Highway, Ferry and International Air visitors.

Round-trip Cruise visitors purchased nearly half of the day tours that were purchased by Package visitors. Cruise/Tour visitors bought nearly one-third and Cruise/Air nearly one-fifth of the day tours.

Among both types of Independent visitors (Independent and Inde-package) the majority of day tours were purchased by VPs. Day tours were purchased by 86% of VP Independents and by 78% of VP Inde-package visitors. The majority of overnight instate tours were also purchased by Independent VPs.

Day tours and overnight tours were purchased by visitors from all points of origin. Visitors from the Western United States purchased from all tour types as did Overseas visitors. Canadian visitors purchased day tours only.

Table IV-D

**Instate Tour Purchasing Patterns
By Visitor/Trip Characteristics
Summer 1993 - All Visitors
(Percent Purchasing)**

Visitor Category	Day Tour	1 Night/ 2 Days	2 Nights/ 3 Days	3 Nights/ 4 Days	4 or more Nights
Trip Purpose					
Vacation/Pleasure	92.2 %	88.0 %	100.0 %	84.9 %	80.6 %
Visiting Friends/Relatives	4.1	3.3	—	—	6.4
Business/Pleasure	3.4	8.7	—	15.1	13.0
Business Only	0.3	—	—	—	—
Entry Mode					
Domestic Air	34.9 %	76.4 %	68.5 %	93.8 %	96.0 %
Cruise Ship	52.0	12.3	13.5	—	—
Highway ¹	9.2	—	—	—	1.0
Ferry	3.1	6.5	8.0	2.3	2.0
International Air	0.8	4.7	10.1	3.8	0.9
Travel Type/Package					
Round-Trip/Cruise	47.7 %	— %	— %	— %	— %
Cruise/Tour	31.6	—	—	—	—
Cruise/Air	18.6	100.0	100.0	—	—
Other Tour	2.2	—	—	—	100.0
Independent					
Vacation/Pleasure	85.5 %	86.9 %	100.0 %	100.0 %	68.0 %
Visiting Friends/Relatives	9.5	13.1	—	—	12.9
Business/Pleasure	3.8	—	—	—	19.1
Business Only	1.1	—	—	—	—
Inde-Package²					
Vacation/Pleasure	78.4 %	86.1 %	100.0 %	80.1 %	86.1 %
Visiting Friends/Relatives	11.6	—	—	—	3.6
Business/Pleasure	10.1	13.9	—	19.9	10.3
Business Only	—	—	—	—	—
Origin					
West	25.8 %	21.2 %	53.8 %	31.6 %	34.7 %
South	25.5	27.3	—	9.7	16.5
Midwest	18.6	18.7	—	27.4	15.8
East	17.3	24.7	36.1	—	26.4
Canada	6.5	—	—	—	—
Overseas	6.1	8.1	10.1	31.2	6.6

¹ Highway mode includes personal vehicle expenses only. Not included are Motorcoaches and trucks.

² Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

Appendix

Appendix

Expenditure-Related Travel Characteristics

Expenditure-related travel characteristics from the *Visitor Expenditure Diary* (VES) returns are analyzed and compared to *Random Arrival Survey* (RAS) results to assess intended behavior versus actual behavior. Average party size among VES respondents tended to remain close to the same as party size information from the RAS. However, some differences are noted between intended versus actual length of stay. (A complete detailed analysis of these characteristics will be included in the *Patterns, Opinions, & Planning Report*). All subgroups analyzed here (entry mode, trip purpose and travel type) tend to stay fewer nights than intended in the state. Unfamiliarity with the geography of Alaska and Canada may cause many to overestimate the time they intend to be in Alaska. Also, based on a comparison of VES respondents' answers to the RAS, it appears the VES is more likely to be completed by visitors with shorter intended lengths of stay. This suggests that overall spending results may be slightly understated.

Table A-1

Expenditure-Related Travel Characteristics Summer 1993 – All Visitors

Visitor Type	Average Party Size ¹		Average Length of Stay	
Entry Mode	VES	RAS	VES	RAS
Domestic Air	2.0	1.9 People	9.6	11.0 Nights
Cruise Ship	2.1	2.2	5.9	5.7
Highway ¹	2.4	2.3	15.2	14.9
Ferry	2.2	2.3	17.4	18.7
International Air	1.8	2.0	10.1	13.0
Trip Purpose				
Vacation/Pleasure	2.2	2.2	9.3	9.4
Visiting Friends & Relatives	1.9	1.8	11.9	15.0
Business & Pleasure	1.7	1.7	10.5	12.5
Business Only	1.2	1.3	6.2	9.3
Travel Type				
Package	2.2	2.2	6.8	6.8
Independent	1.9	1.9	10.5	12.0
Inde-Package ²	2.0	2.2	16.4	15.9
Overall Average	2.1	2.1	9.5	10.2

¹ Excluding parties of 10 or more
² Highway mode included personal vehicles only. Not included are Motorcoaches and trucks.
³ Inde-Package visitors are independents who plant o purchase sightseeing tours during their trip.

Methodology Summary

The Arrival Count (AC) is the method of counting all passengers (visitors and residents) who enter the state. The count is conducted by obtaining passengers counts on highway and cruise ship arrivals, through U.S. Customs records airlines and the State Ferry.

The *Random Arrival Survey* (RAS) then determines whether passengers are residents or non-residents. The ratio of sample composition is used to determine composition for the full passenger count. Since scientific sampling reflects the total population characteristics accurately, a high level of confidence exists in the true composition of all arrival figures. The resulting data in this report can be considered accurate within $\pm 0.4\%$ to $\pm 1.8\%$ at the 95% confidence level.

The *Random Arrival Survey* methodology is based on the personal interviewing of statistically selected passengers arriving by major modes of transportation at all principal points of entry. Passengers are sampled as they arrive at their first point of entry by Domestic Air, Highway, Cruise Ship, Alaska Marine Highway System and International Air. Sampling is done at Anchorage, Fairbanks, Juneau, Ketchikan, Skagway, Alcan and Taylor highways, as well as on the State Ferry System from Bellingham and Prince Rupert to Ketchikan. Sampling began in May 1993 and will continue through May 1990. Traffic sampled at these locations is estimated to account for over 96% of all traffic entering Alaska by these modes.

The personal interview technique was selected as the methodology which would best minimize non-response and omit self selection bias, two problems common to travel research projects. Personal interviewing allows for control of the interviewing environment and scientifically accurate selection of respondents. Equally important, personal RAS interviewing has a positive effect on response to the *Visitor Opinion Survey* and *Visitor Expenditure Survey* phases of the program.

The *Visitor Expenditure Survey* (VES) was given to half of all respondents after they completed answering the *Random Arrival Survey*. At the completion of the RAS, a respondent was presented with a VES diary and asked to record their expenditures during their stay in Alaska. The interviewer familiarized the respondent with the diary, pointing out and explaining important instructions for recording expenditures. Each VES diary was numbered to match the corresponding RAS to accommodate computer processing.

Methodologies by Mode

RAS interviewing methodology is the same for each of the five modes surveyed. However, scientific sampling design and interview interception points vary by mode. The following provides an overview of the arrival count, sample design, and fielding methodologies by mode.

Domestic Air

Domestic air arrival counts were obtained through a voluntary confidential reporting system. All domestic air carriers participated, making possible an analysis of the complete Alaska visitor market.

During the summer months of May through September, the *Random Arrival Survey* was administered by uniformed, professionally trained interviewers who met scientifically selected flights on 37 scientifically selected sample days at four points in Alaska: Anchorage, Fairbanks, Juneau, and Ketchikan. Passengers were identified as residents or non-residents. Every "nth" non-resident was presented a small Alaska lapel pin and interviewed. The number of non-residents interviewed from each flight was four. More than 96% of the non-residents selected through this procedure completed the RAS interview.

Cruise Ship

Cruise Ship arrival count data was obtained through U.S. Customs offices in Ketchikan and Juneau, and verified through Cruise Line Agencies of Alaska.

For the cruise ship sample, random selection of 37 Cruise Ship voyages from May through September was made based upon passenger loads. Uniformed interviewers met each selected ship and interviewed every "nth" passenger as they came ashore. Interviewing procedure was the same as domestic air; the passenger was presented with the lapel pin and then interviewed. A target of 20 interviews were conducted from each vessel, with the sample distributed among passengers taking tours and not taking tours. Nearly all passengers approached agreed to be interviewed, with less than 2% refusing.

Marine Highway

RAS or Arrival count data for the Alaska Marine Highway System was obtained from standard voyage reports generated by the purser's office and available from the Traffic Manager's office in Juneau.

From May through September, uniformed interviewers rode the ferry between Bellingham and Ketchikan, and Prince Rupert and Ketchikan on 30 randomly selected voyages. (Voyages were selected in proportion to passenger loads). During the sailing, interviewers followed a predetermined skip pattern in each section of the vessel to determine resident/non-resident composition and insure random selection of respondents. Passengers were approached according to the skip pattern and the RAS was administered using the same procedure as other modes. Summer season target samples per voyage were 30 on the Bellingham-Ketchikan run and 20 on the Prince Rupert-Ketchikan run. Nearly all passengers approached agreed to complete the interview, with a less than 1% refusal rate.

Highway

Arrival count data was obtained from the U.S. Customs port directors' offices in Alcan and Skagway and from U.S. Customs headquarters in Anchorage.

Three highway locations were sampled from May through September: the Alaska Highway at Alcan, the Taylor Highway at the Poker Creek border, and the Klondike Highway at Skagway. Forty sample periods were selected based upon traffic patterns and weighted in proportion to traffic volume. A tally of highway traffic was kept to determine resident/non-resident composition. Every "nth" vehicle was administered the *Random Arrival Survey* by uniformed interviewers immediately after clearing customs at Alcan and Skagway, and near the Tok Junction on the Taylor Highway. Only those highway travelers who were entering Alaska for the first time (rather than having arrived via State Ferry or visited somewhere in Alaska previously on this trip) were interviewed. Procedure for administering the RAS was the same as previous modes. Most visitors approached agreed to be interviewed with a refusal rate of less than 2%.

Motorcoach passengers were not interviewed for the Summer 1993 RAS. However, during each sample period, all motorcoaches were stopped and drivers were asked the origin of the motorcoach, the number of passengers and whether the motorcoach was entering Alaska for the first on this trip. This information was used to determine the size of the first arrival motorcoach market.

International Air

International Air arrival count data is obtained through U.S. Customs and Dynair (the company responsible for all ground arrangements for international air carriers) at the Anchorage International Airport.

From May through September international air passengers were administered the RAS on 23 statistically selected sample days by uniformed interviewers. All passengers deplaning on sample days were asked resident/non-resident status as they left U.S. Customs and every "nth" non-resident was interviewed. Sixteen interviews were conducted each sample day. To minimize non-response and to insure a representative sample of all visitors, interviewers were assisted by foreign language questionnaires (in Japanese and German), signs in the customs area, and Japanese, German and Russian-speaking interviewers.

Data Weighting Procedure

Following sample design and actual fielding, raw RAS results are then submitted to a statistical weighting procedure in the data processing phase. This sample weighting insures accurate expansion of sample results to the arriving passenger population.

The weighting is a multistage procedure and includes voyage and flight passenger loads, detailed arrival counts by mode, resident/visitor sample proportions at all sample points by mode, location and time period.

The VES diaries were weighted using the same procedure as the RAS.

Sample Size and Reliability

The final result of the May-September 1993 summer season VES program is a statistically reliable random sample of 1,297 arriving visitors with a maximum margin of error of $\pm 3.0\%$ and a probable margin of error for most results of $\pm 0.6\%$ to $\pm 2.8\%$. The standard margin of error accepted for most scientifically controlled market studies is usually much greater, $\pm 5.0\%$. The Alaska Visitor Statistics Program insures that even sub-analysis by each individual entry mode is in an acceptable range.

Table A-2

**Visitor Expenditure Survey Sample Distribution
Summer 1993**

Mode	Number of Interviews
Domestic Air	350
Cruise Ship	283
Highway	274
Ferry	229
International Air	161
Total	1,297

Table A-3

**Visitor Expenditure Survey Reliability Intervals
At 95% Confidence Level - Sample Size 1,297**

When Survey Result Is:	Then Maximum Margin Of Error Is:
1% or 99%	±0.6 %
10% or 90%	±1.7 %
20% or 80%	±2.2 %
30% or 70%	±2.6 %
40% or 60%	±2.7 %
50% or 50%	±2.8 %

This table reads: Given the sample size of 1,297, readers may be 95% certain that any state-wide survey result is within a maximum of $\pm 2.8\%$ of the true mean of the survey population.

The VES was designed to yield reliable sub-samples of each entry mode's visitors. The margin of error ranges for entry and trip purpose categories are as follows. These should be considered when examining results in these subcategories.

Table A-4

VES Sub-sample Minimum & Maximum Error Levels At 95% Confidence Level

Mode	Sample Size	Margin of Error When Survey Result is:	
		1% or 99%	50%
Domestic Air	350	±1.0 %	±5.4 %
Cruise Ship	283	±1.1 %	±5.8 %
Highway	274	±1.1 %	±5.8 %
Ferry	229	±1.3 %	±6.7 %
International Air	161	±1.6 %	±8.2 %
Main Trip Purpose			
Vacation/Pleasure	1,043	±0.6 %	±3.2 %
Visiting Friends & Relatives	118	±2.0 %	±10.0 %
Business & Pleasure	66	±2.5 %	±12.4 %
Business Only	70	±2.4 %	±12.0 %

Acknowledgments

The *Random Arrival Survey* and the *Arrival Count* phases of the *Alaska Visitor Statistics Program* rely a great deal on the cooperation and good will of those involved in the Alaska visitor industry. We would like to thank the following people and organizations for their assistance:

- The management and ground crews of the Domestic Air Carriers serving Alaska: Alaska Airlines, Delta Airlines, United Airlines, Northwest Airlines, Hawaiian Airlines, Morris Air, Sun Country, Continental and MarkAir;
- The management and ground crews serving the International Air carriers and the Development Specialist office at the Anchorage International Airport;
- The Alaska Marine Highway management and on-board personnel;
- The management, cruise directors and motorcoach coordinators for the cruise lines, as well as Cruise Line Agencies of Alaska;
- The U.S. Customs Service personnel at Alcan, Poker Creek and Skagway.

States Within Geographic Census Regions

WEST	MIDWEST
Pacific Coast California Hawaii Oregon Washington	West North Central Iowa Kansas Minnesota Missouri Nebraska North Dakota South Dakota
Mountain Arizona Colorado Idaho Montana Nevada New Mexico Utah Wyoming	East North Central Illinois Indiana Michigan Ohio Wisconsin
SOUTH	EAST
West South Central Arkansas Louisiana Oklahoma Texas	New England Connecticut Maine Massachusetts New Hampshire Rhode Island Vermont
South Atlantic Delaware District of Columbia Florida Georgia Maryland North Carolina South Carolina Virginia West Virginia	Mid Atlantic New Jersey New York Pennsylvania
East South Central Alabama Kentucky Mississippi Tennessee	

VES Comments

Domestic Air

"We were impressed by the friendliness of people. Very much enjoyed the excitement of start of Commercial Salmon fishing, the tour through the cannery at Larsen Bay and the bear and bird watching. Our expenses while on Kodiak were very low since our son and daughter-in-law paid all our expenses. We already miss Alaska and hope to return at some future date."

"Great weather - sunny every day. Had tremendous time. Truly a great state. People extremely friendly. Thanks."

"We will be back - to live - We love Alaska!"

"Great trip, we saw a lot of Alaska. Great weather, mountains are beautiful. Thank you. Good-bye."

"Saw moose on road - lots of eagles. Saw dall sheep and bald eagle. Went to drive in mountains - got rear ended at red light - took the day - no one was hurt! The state is gorgeous - beautiful. People are mostly friendly - nice place to be. Had a great vacation. Love your State. Took back lots of information for friends on your cruises and tours, etc. Will be back someday. Hopefully can afford to do more! I love this place!"

"Sorry but I didn't keep account of what I bought. My daughter took care of everything. This was my vacation. I did spend a total of \$100.00. this included gifts and souvenirs. "

"We don't buy lots extras. Not average spenders."

"Money well spent. Enjoyed every minute. 1 day rain in ANC otherwise every stop clear & beautiful."

"Need recycling bins everywhere. I threw out so many things I would recycle at home and felt terrible about it! Employees in visitor info centers need to be more informed about what attractions are open and when. Best - Anchorage. Worst - Valdez."

"Alaska was wonderful!"

"We had a great time. Loved the state and its beauty."

"Thanks for the pin and the \$5.00. Loved Alaska, plan to be back often. "

"I loved you state - magnificent! Possibly see you in Sept. for Opticians Convention - Anchorage. Thanks. "

"I want to say thank you for the pin and the money. What a nice gesture. Alaska is most beautiful. The people on a whole are not too friendly but everything is so pretty. Had we been thirty years younger we would have stayed forever. Thank you once again."

"Had a great time!"

"Have bought food - shirts - many other gifts - fished much - enjoyed much - will be back again soon. THANKS ALASKA!"

"Enjoyed our visit with our family and visiting Alaska very much. Thank you."

"Had a wonderful stay!"

"Thanks for the \$5.00 - yes I spent it - on a slot machine. Yes - I lost it. Had a wonderful time and hope to return.

"Thanks for the \$5.00. I never realized it was money until I opened it. Thanks. "

[Each of these statements were written on different days]"Went camping, Still camping, Home at Fairbanks, Gone camping, Still camping, Stranded? Nope, Saved! Whew!!!, Back in Fairbanks, Flew home. Thanks Alaska. What an experience! You're Beautiful!"

"God bless Alaska. It is fantastically beautiful. Signed with love."

"I'm sorry, you require too much info. We enjoyed our stay but do feel Alaska is extremely expensive!"

"What a beautiful place. We envy you."

"Alaska's sport fishing regulations are getting screwed up. This may slow down tourism in the future."

"Left Alaska at noon Sun. by air due to lost (stolen) wallet and credit cards while in Soldotna Saturday. (No fish either.)

"This is our second trip to Alaska in 3 years, so not too many purchases!!"

"This trip I'm afraid the questions asked in this diary just did not mesh with my trip. Because I arranged to have everything paid with vouchers, it was impossible to write a detailed daily account of expenditures. There is the possibility that there may be some adjustments made upon my return to Japan so I regret that I cannot really do a detailed daily expenditure report. I have listed below my general feelings as to high and low costs in general. (I was also extremely busy everyday during my stay.) Airfare - high (expensive); hotel - high; motel - cheap; meals - cheap; events - cheap; gifts - it varied. My impressions." (Japanese survey)

Highway

"This place [Border City] is a rip-off. \$1.79 a gallon for gas; \$1.00 a cup of coffee. Why is gas only \$1.10 a gallon in Wasilla?"

"We had a great time!"

"Plans to take RV to Kodiak were scrapped. Found out we needed a 2nd tow vehicle on both ends of ferry trip. We have not enough time for this hogwash. We should have been told this at the time we purchased ferry tickets, but were not." [Respondent did, however, proceed to Kodiak.] Please keep your road system the way it is. I think tourists will ruin Alaska for you if you add to and improve the highway system. If you wonder what I mean by this, please write to me. Thanks, Alaska has been great!"

"The determination of the correct category took lots of time and I'm still not sure on some. I more than earned the \$5."

"This is our second trip here and there has been no improvements to speak on the roads. They are awful."

"We're sad to leave Alaska. It has been a wonderful experience!"

"Was unimpressed with Fairbanks, becoming too much a tourist trap. Reminded me some of Honolulu (was there just 2-1/2 months ago). Rest of state was fine and people very good. You can use some rest rooms, at the turnouts, on 3 between Fairbanks and Cantwell. Also some are needed on 1 between Anchorage and Glennallen."

"Make roads wider with a wide shoulder, then in future repairs: repair 1/2 at a time so that other half can accommodate "2" vehicle traffic. Two-way traffic because the should is wide and paved. Like Texas!"

"And a good time was had by all!"

"On 6-22-93 we purchased a tour on the first private bus that left the Lodge that morning. We drove up to a certain point - not where we could catch the shuttle bus up to the lake and he turned around and went back. We were on our way down and were back at the lodge in the park at 11:30. It seems some of the ladies had asked the driver to get back early. We saw a few caribou - a bear so high up no one could tell what it was, ground squirrel and marmot. We were upset after we returned and were told why we didn't make our complete tour. We are both in our 70's and will probably never come back to Alaska. We thoroughly enjoyed your scenery, people and hospitality. We just feel we were ripped off on our Denali trip that we had so looked forward to."

[Comments recorded daily from 7/4/93 to 8/1/93]

"Arrived in the Great State of Alaska for the 15th time for good fishing in the Kenai River. Noticed the population growth of Tok. Enjoyed the food at the Alaska Land Salmon Bake. North Pole hasn't the show of population growth. Enjoyed the new bypass road from Chena road area to Peger Road. Keep Denali Park forever primitive. Don't relent to Kantishina growth for better roads. Noticed improved street of Lake Otis past 84th Street. Good and as always, needed. Same as all busy cities. Lots of noise and such [Anchorage]. "Hoping to be able to catch a much awaited red salmon."

For AK Dept. Fish & Game: Fishing on Kenai today [7/13/93] slow in comparison to 1987 & 1988 red fishing. Fishing red salmon at favorite spot on Kenai and is slow. Where are your reds? Enjoyed halibut fresh from ocean today. Hope the supply is there forever. Hope the salmon (king) stamp does some good for perpetuating the species. Not anything grand for fishing the red salmon today. Fair I guess for this year, so the native people say. Finally able to catch my 2 red salmon today after 4 hours of fishing. Managed to catch 1 red salmon today after 3 hours of fishing. Not like the old yesteryear fishing. Yes the river is still flowing, but there is a lack of red salmon. Very poor sockeye fish run up the greatly publicized Kenai River, for the bank, sport fishing people. Words spoken by them of not returning to Alaska again for lack of sport fish in the Kenai River. Very poor fishing the much publicized Kenai River fishing for the sport fishing people! No Kings caught for the 5 people in the boat for 5 hours in the morning! Very poor sockeye & Chinook salmon fishing. My wife and I are quite disappointed! Missed my reds completely today & I'm not that bad a fisherman. Whey & why not some reds. 1 red today for 3 hours, very poor fishing. Finally 2 reds today by hook & patience. 2 hours. At last 2 red salmon today. I was one of many-many fishing people that were fishing, but very few caught the limit. 2 hours. of fishing. No one on shore after 4:00 PM. No fish. No red salmon in 4 hours. of fishing. Where are the reds, & why none. No sockeyes today either, but only 1 hours. of fishing. Just the same it's very poor fishing. No red salmon today. Useless Kenai River fishing. No red salmon in the Kenai River today. Thanks to the Fisheries Board gouging & monetary greed. sell out to the foreign pricing, & or sales of industry to foreign money. No more red salmon. You blew it again. How about reviewing your policy & doing it for the future generation's better living."

"Thank you for the \$5 gift."

"Thanks for a nice visit. Scenery is beautiful. Had a problem with your road signs & information signs - all are shot at! 1/3 you couldn't read distance or other things - more of the vacationers were complaining - was everywhere from Border to Tok to Fairbanks to Anchorage to Tok to Border - Isn't that dangerous? Does any ever get caught?"

"Disappointed!!! No air conditioning. 5% extra for using Visa when buying beer: Tok Lodge. Had great time! Thanks!"

"Our expenses were for five people in a 25' motorhome. Most camping and RV expenses were paid at military facilities and therefore are somewhat cheaper. We enjoyed our stay and will probably be back. Signed."

"We thoroughly enjoyed Alaska. Unfortunately the LeConte broke down & we were unable to visit Sitka - this gives us an excuse to return at a future date."

"I sure dislike seeing things made in other countries. Should support our own! Had a great time & I'll be back 0 this was my 4th or 5th trip up."

"Road construction delay. Sign "3 min. maximum delay on highway 3 - Anchorage. Delay actually 20 min. Strongly suggest new sign or lessons in telling the time for workers. Not conducive for continued Alaskan travel. Left Alaska earlier than planned. Scenery was beautiful. State & U.S. Parks - superb! Road construction/destruction appears to be planned to discourage tourism and it is very successful. Most restaurant were dirty. Surely soap & water is available. We are from rural Missouri and do not expect luxurious accommodations but also did not expect plain old primitive dirt in public facilities. Alaskan rural areas look like something from the 1930's Tobacco Road or Grapes of Wrath. Appears that Alaska has a lot of "growing up" to do. Commercial RV Parks - poor. Do you have a state inspection system for accommodations/restaurants/facilities? If yes - is it used? frequent inspections? If no - Perhaps you as a state should consider establishing one - and using same."

"This charge was 4 times the Lower 48 charge for oxygen - exorbitant. What a rip off -(liquid air). We'll never come back here due to these charges! [Anchorage]."

"Had a great time in your beautiful state!"

"Enjoyed your state of Alaska very much. Hope to return soon."

"Alaska should concentrate on making the first 10 miles of highway first class. Even if it takes building a pair of extra lanes so you can alternately repair them. My first impression of Alaska was the first several miles of highway and that was bad."

"Had a great time in the Beautiful state of Alaska. Hope to return someday."

"Note: Food on ferry rates a minus zero. Priced like a restaurant; quality just short of inedible. A cold sandwich would have been better. Most food on this trip has been good to really excellent, however. Suggestion: Could more really choice Native Indian art work be made available in Alaskan shops? It's true that less expensive things are in greater demand, but we tend to buy fewer 'touristy' items in favor of something small but representative and authentic, preferably under \$100. The furry thimbles are nice, but I kept looking for something else in between that and the \$100 top. We bought a lot of ulus as a compromise but wished they weren't 'factory made'. Too late we found several we liked better after we gave up having decided in favor of availability. Board ferry for Prince Rupert, BC. Will buy meals and hope quality is better than the Whittier-Valdez crossing which provided enough grease to lubricate at least one vehicle."

"I have enjoyed filling this out. The way you have the expenses categorized has helped me understand how I spend money. "

"Heading back to Yukon and down the Cassiar Hwy. Very pleasant time in Alaska. Mt. McKinley showed off for 2 days!"

[Comment on different days] "Chicken neat - nice people. "Broad at Visitor Centre [Tok] was not at all welcoming. She must have had a bad day!" Delta people great. Texaco man really friendly - and we didn't buy anything! Used his sani-dump. In Haines the Chevron Service Station said he couldn't fill our truck with propane (he wasn't allowed). Then finally he said he would for \$2.35/gal. At the RV Park they asked \$1.83/gal. Wild? Our vehicle happens to be powered by Auto Propane. The fluctuation in price from \$2.35 per gallon to \$.93 per gallon is a joke. In Kenai it was \$1.55 and refinery is only a few miles away. We pay the equivalent of \$.62 per (US currency and gallons) at home."

"Our 4th time. We will be back."

"We have enjoyed Alaska, especially the day light hours and scenery. But you sure have to clean up your campgrounds. We have paid up to \$10.00 and all we got was a sticky toilet and dirty tables."

"We really enjoyed our time spent in Alaska. We are planning on coming back in 2 or 3 years."

Note: Since I slept in my car, no motel bills are listed. I wish your company success with this investigation. Yours truly, P. S. Thanks for the 5 bucks!

Ferry

(Malaspina from Prince Rupert-Haines) "Found Ferry to be disappointing. We didn't expect a cruise ship atmosphere but expected something better than it was. Ferry was poorly maintained, our cabin was not clean, cattle car atmosphere with people sleeping everywhere, food expensive and below average and staff not courteous and very cold other than Tommy Jimmy who was very courteous and informative. Also, loading and unloading of Ferry not organized. Canadian-Ferry overall was much better. We would not take the Alaska State Ferry again."

"Initial plan was to spend a longer time period in Alaska but due to poor weather, time period was shortened."

"Most campgrounds were very courteous and accommodating with the exception of Johns - Anchorage. Excellent campgrounds were: Sourdough - Tok, Rivers Edge - Fairbanks, Helena at Chilkoot in Haines was very accommodating and went out of her way to help us."

"More retail fish markets should be made available to tourists for those who do not fish and fish should be at a reasonable cost."

"We may spend one more day in Alaska on a day trip from Whitehorse to Skagway."

"I had a great time in Alaska. Hope to return. "

"Dear Folks: We agreed to keep track of expenses in Alaska for 14 days, but had to change plans (due to illness and impending border closure), so am sending brochure partially completed and please accept apologies and return of \$5.00 'gratuity'. Sincerely."

"It would be helpful to many travelers if the Ferry could go as far as Seward, Valdez or near Anchorage."

"Good-bye Alaska and Thank you."

"This was a bear hunt in which most expenses were taken care of prior to arrival in Alaska. I hope this will be of some help to you. Thanks! "

"A note about Prince Rupert to Skagway ferry: Washroom facilities are difficult. Seat on toilet would be good, also hooks behind door to hang clothes & towel."

"29 beautiful days, 1 rainy day. An excellent trip - our second."

"Tourism should liaison more with ferry officials for the benefit of the tourist. \$25.00 for twenty minute tour by taxi was a little steep. Also would have preferred a little more time in Juneau and a little less in Wrangell. Ferry schedule does not allow enough time for touring or shopping. Purser office: no or very little information on travel mode ashore."

"Denali Grizzly Bear RV Camp: not too courteous or helpful; extra money for showers. Rivers Edge RV Park very nice, clean and helpful."

"Note: Would have taken short bus tour during layover if available."

"We had a wonderful time in Alaska. I enjoyed keeping this record."

"We enjoyed our visit to Alaska! Hope you can read my diary. I know I've got days mixed up but when you travel the days run into one another and you forget what day it is. I've enjoyed keeping this diary. Hope it helps you. Thanks."

"Note: I'm getting on the Columbia now to Bellingham. I want to mail this in Haines, so I'll not be including food expenses on the boat although I realize it's considered Alaska! We had a wonderful time in Alaska. Most of the people were friendly and helpful. Your scenery is beautiful. I teach elementary school. We'll be studying Alaska in the fall, for sure."

"Suggestions for improvement. 1. Increase capacity on 800 reservation number. VERY difficult to get through. Busy lines. 2. Have pursers have information on airport lobby hours and ferry terminal lobby hours. Open when ferry arrives Juneau in the middle of the night. For example, if the ferry arrives Juneau at 3 am, where can one wait for airport rental car agencies to open and how does one get to airport. Even Juneau Visitors and Convention person at ferry terminal could not give such information, nor could on-board pursers.

"Had a good time."

"We did this wonderful trip by Alaska State Ferries. It is difficult to state expenses for Ferries and hotels as my brother from California planned the trip. Through Customs and back in Prince Rupert after such a great time in Alaska."

"Good Luck with the survey."

"Avis rented us a car to go to Whitehorse. Turned back at Canadian customs because it is illegal for Canadians to drive an American rental car in Canada. Threatened to impound car. Returned to Avis within 2 hours but charged for the day."

"When we got on the Alaska Ferry at Prince Rupert, we were charged an extra \$37.00 for our van. Our van is an ordinary van. B.C. ferries have never charged extra. A rip off. We were not the only tourists who were ripped off and we will never use this ferry again. We are on our way to Whitehorse, Yukon and will not be visiting or staying in any Alaska cities - all our expenses will be on the ferry. Someday we would love to visit Alaska - But not on Alaska Ferries."

"We were disappointed to find when we arrived in Seattle that it was not possible to purchase an Alaskapass; we had hoped that we could travel all around Alaska in this way. Unfortunately, we fell between the dates when the summer pass finished and the winter pass started; we had conflicting answers from agents about what was available for us to do and finally decided that we would have to 'go it alone'. If it were not for the friendly Americans that we met along the way, we would not have been able to see nearly as much as we did. Alaska is truly a unique and marvelous country, and we hope to be able to return to explore some more on another occasion. We were disappointed that we could not do the train trip that we had planned; therefore we will be much more careful about our timing next time we come."

"Thanks for part of supper money!"

"Please accept following rather than daily. All meals eaten on board, i.e., Breakfast & Dinner about \$50 to \$60 per day for two - other 'snacks' from Snack Bar. Side trip for 2 people in Haines, 3 people in Skagway, 3 people in Sitka. Prices not out of line - but time so limited that highlights & comments would be better by tour guide and less actual stops. On Columbia, cabins very nice, service excellent - surprised at having to wait on self at Bar. Scenery spectacular, comments interesting.

"Dear Sirs:

There was one last minute modification to our costs. Upon arrival at the state ferry terminal on the 21st [July] we were told the ferry was more than 12 hours late. Since we planned 10 hours between ferry arrival and our air connections I had to change our entire return trip. We spent the night in this [Travelodge] hotel (\$125) and I had to book a flight to Seattle (\$670). I had called the ferry early in the day and was told it was running a 'little' late. I tried to call in the early evening and could not reach anyone at the terminal or the state ferry telephone number. This was certainly an unpleasant finish to the vacation. At least some message should have been announcing this delay at the standard telephone number. Perhaps if I had known about this problem at 6 PM rather than 1 AM I could have been better able to resolve the problem in a more economical way. In my case, I had a connecting flight from N.Y. to Paris that I could not contact at 4 AM New York time to see if I could change the flight. Please! Try and arrange that some message is played on the telephone line when excessive delays are expected in the ferry. A delay of more than 8 hours. should be considered excessive. Signed."

Cruise Ship

"We stayed on the ship all day! Too much ice in the [Glacier] Bay, we had to turn around. Got up at 4:30 AM to go into Anchorage to go home. Waited 2 hours. to check luggage, bought 3 coffees & 1 roll for \$5.60. Everyone is tired and out of sorts. Good-bye!"

"Truly a wonderful place! I am looking forward to returning some day."

"This is submitted in place of the detailed information you request. There just was not enough time or energy in our busy schedule of day-to-day 'touristing' to record each expenditure. Our trip was especially tailor-made for us from Minnesota, on up to Fairbanks, much of it prepaid and some not prepaid. We do know that we averaged about \$80 per day for expenses over and above prepaid package - food, 2 overnight hotel costs, souvenirs, clothing, etc. This can be doubled, probably (the daily expenditure diary), to represent the two of us tourists, traveling together but paying independently. Our experience in Alaska was one we'll never forget - excellent, with just one bad happening. One of us lost a camera. The hospitality and sea-shore experiences were the best."

"Had wonderful time. Would love to come back."

"Thank you for "Alaska" pin. I wore it the whole time and shall continue to do so. Also thank you for the \$5 - purchased a couple small souvenirs I might not have done otherwise."

"Gentlemen: My husband and I felt very honored to have been chosen to participate in your survey of tourists and wish to thank you, particularly for giving us \$5.00 which was totally unexpected. I would have done the survey without receiving this money. I am sorry, but it was absolutely impossible for the survey to be mailed in Alaska as desired, since purchases were made up to the last minute before boarding the ship. In fact, a very good possibility exists for a purchase which may total \$1000 as I have sent a \$200 deposit to Mr. John M. MacDonald of the Russian-American Company in Sitka for some merchandise. Also thank you for the lovely Alaskan pin. We certainly found Alaska very fascinating and the possibility exists we may duplicate this trip with a brother of mine with his wife. We did have another 2 relatives with us who otherwise would have not come had we not invited them. One of them participated in all the excursions offered including the helicopter. Again, thanking you and looking forward to coming to Alaska again. Very sincerely,"

"Not enough time in Alaska. Will be back - the cruise was a good start to know where to go next time!"

"Loved it!"

"Did not purchase much while in Alaska. It was very expensive."

"Our thanks to your gracious hostess in Juneau. My apologies for not dropping it [daily diary] back in the mail on a wet day in Ketchikan."

"We bought very few souvenirs and all were small. Sorry we couldn't have been more help."

"We enjoyed immensely our opportunity to visit the Great State of Alaska. We hope we can come back in the future."

International Air

"I am not able to say exactly [what] we spent in 29 days. About 750 [marks or lira?] for two people. We were traveling by motorhome and cooked our meals in the motorhome. We have a very good time! Thank you.

"Thank you for the great time! Alaska is great! Thank you for the \$5 gift!"

"My stay here was great. Thanks to all."

(German surveys)

"Alaska is for us kind vacation to make; a wonderful state. The nature, the vastness and naturally it is American. We again and again probably Alaska for us is not typical for America. Maybe the situation is unusual. We are traveling with our 14 month old baby. But also then in Alaska they are really flexible are about children."

"Excuse me. The expenditure is just too big, this diary to carry on. It gives here so much to see, that I have not time for it. Alaska we feel is for us good. We are enthusiastic. The people are friendly and helpful. The hotels were pretty, clean and comfortable. More is attractive. There are so many older tourists that America has here. Is Alaska for young people too?"

(Japanese surveys)

"#1 I first came to Alaska in August 1969. In June & July of 1970 I climbed Mt. McKinley. We climbed part way up on skis. After that we carried our skis to the summit. Then we skied back down to the landing sight. There were 10 of us. #2 From Dec. 31-Jan. 6, 1970 I went with a group on my first ski tour (tour name Alyeska). The group was from the magazine Yama to Keikokusha (an alpine magazine). Since then I've been on a lot of ski tours. Film of my skiing has been shown on Asahi TV and also the news. Since then the tour name Alyeska has changed to SEIBU. Now I come as a tour leader. I have brought about a thousand people to ski in winter & trek in summer. I love Alaska & have built a small cabin at Alyeska. I advertise the Alpine Ski School in magazines and contract with Seibu to bring clients here. I'm well known in alpine climbing and skiing circles. #3 I look forward to a continuing relationship with Alaska and invite Alyeska ski coaches to Japan. #4 I've had a long time good relationship with Mr. Aragaki of the Div. of Tourism. I think he's no longer there. I hope to enjoy good communication in the future, too.

"I was traveling with Japanese & American friends who took care of all arrangements & payments so I'm sorry that I can't fill out this diary in the manner requested. This trip was arranged in L.A. and I don't have a real detailed understand of it. Also I'm going around with a friend and he is paying out the money so it's not real clear to me what specific costs are."

"Sorry I couldn't include more detail. The best things about this trip: View of glacier from boat cruise on Prince Williams Sound. The 2 hour helicopter tour over the glacier was wonderful. Unfortunately we didn't get to see Mt. McKinley because of the clouds. I'll recommend the glacier trip to all."

ALASKA VISITOR

State of Alaska Survey
The McDowell Group, Inc.
P.O. Box 21009
Juneau, Alaska 99802-1009



ALASKA

Official

Visitor
Expenditure
Diary



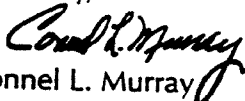
Dear Alaska Visitor,

Your participation in this project is important and appreciated. The information you furnish will enable us in Alaska to improve the quality of travel to "The Last Frontier".

We guarantee that no individual data will be identifiable or released to any organization or person for any purpose whatsoever; only totals will be used for accurate understanding of the patterns of visitor spending.

Thank you for helping us.

Sincerely,


Connel L. Murray
Director, Division of Tourism

IMPORTANT INSTRUCTIONS

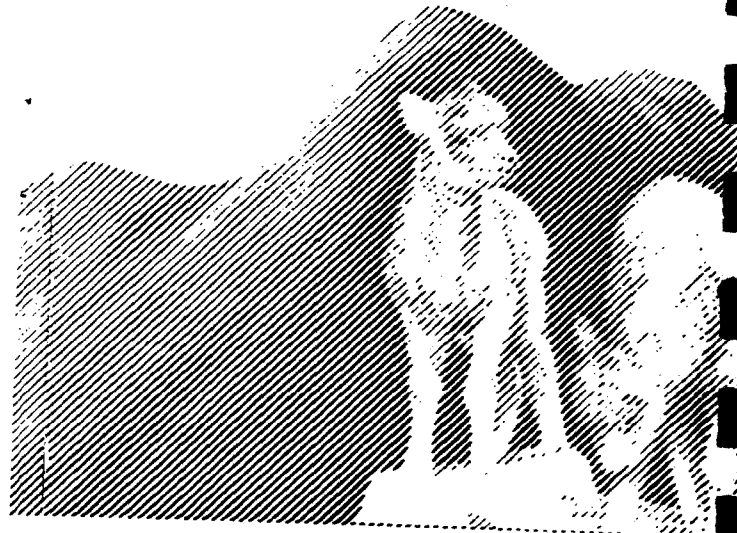
1. DAILY DIARY -

(Pages 12 - 40) - This will be a daily diary of your expenses while in Alaska.

- Keep the Diary for the entire length of your stay.
- Please include all tips and taxes.
- Do not include expenses while in Canada (including Canada's Yukon) unless the expenses are part of a prepaid trip package price.

2. ACCURACY -

- Your accuracy will help insure the quality of our data so we can make more informed decisions.



Kindly Fill In The Following:

3. PREPAID TRIP PACKAGES -

(Pages 5-6) - Please record any

- cruise
- fishing
- tour
- wilderness/adventure package you bought before coming to Alaska.

4. TRIP PACKAGES BOUGHT IN ALASKA -

(Pages 7-8) - Please record any

- sightseeing
- fishing
- cruise
- wilderness/adventure
- cultural entertainment package you bought while in Alaska.

5. EXAMPLE -

(Pages 9-11) - Please see the Example Diary Day and Expense Categories.

6. DEPARTURE QUESTIONS -

(Page 41) - Be sure to complete these questions before sending in the booklet.

7. BE SURE TO MAIL US YOUR COMPLETED BOOKLET -

When you have completed your stay in Alaska,

- please seal the Diary with the pre-glued flap on the inside back cover, and
- drop it in the mail just before you leave Alaska.

8. STATE OF ALASKA SURVEY OFFICE -

If you have any questions about filling out the Diary, please call the Alaska Survey Office in Juneau at 586-6126. Our staff will be happy to help you.

1. Date of Arrival in Alaska ____/____/____
month day year

Date of Departure from Alaska ____/____/____
(Fill out before dropping in mail) month day year

2. What mode of transportation did you use when **entering Alaska** (crossing the Alaska state line)?

- ☐ Air from USA
- ☐ Air direct from foreign country
- ☐ Alaska State Ferry
- ☐ Highway
- ☐ Cruise Ship
- ☐ Other _____
(please specify)

3. Including yourself, how many persons are traveling in your **immediate** party sharing expenses such as food, lodging or local transportation?

_____ # in party, including yourself

4. Which one of these categories best describes your main trip purpose?

- ☐ Business only
- ☐ Business and Pleasure
- ☐ Vacation/Pleasure
- ☐ Visiting Friends or Relatives

5. Which type of travel best describes this trip?

- ☐ Prepaid package trip (Skip to page 5)
- ☐ Completely on own (independent)
- ☐ Completely on own but will purchase sight seeing trips while here.

Cover Illustration ©Doug Lindstrand, Alaska

FOR INDEPENDENT TRAVELERS

6. Are you traveling independently (**not on a prepaid tour**)?

☐ YES ☐ NO (Skip to page 5)

IF YES, please fill out questions 7-8a.

7. How did you **enter** the State of Alaska?

☐ Air ☐ Alaska State Ferry ☐ Highway

- 7a. If you entered by **AIR or Alaska State Ferry**:

What is the cost of transportation **to and from** Alaska for your whole immediate traveling party? \$ _____

Is this a round-trip price? ☐ Yes ☐ No

How many people does this price cover?

_____ (# of people covered)

8. How will you **leave** the State of Alaska?

☐ Air
☐ Alaska State Ferry
☐ Highway
☐ Other _____
(please specify)

- 8a. If you leave the State of Alaska by **AIR or Alaska State FERRY**:

What is the cost of transportation **from** Alaska for your whole immediate traveling party?

\$ _____

(enter amount if you entered only the one-way cost in question 7a above)

PREPAID TRIP PACKAGES

9. Are you traveling on a prepaid trip package, for example, a cruise, fishing trip, tour or wilderness/adventure trip?

☐ YES ☐ NO

IF YES, please fill out questions 9a-15.

- 9a. Briefly describe your trip package

10. How many traveling days are included in your trip package? _____ (# of days in tour)

11. What is the name of your prepaid trip package company? _____

12. When you paid for this trip package, how many people were covered by the price?

_____ (# of persons paid for)

13. What was the **per person** price of this prepaid trip package?

\$ _____ per person

14. What did this price include? (Please check all that apply.)

☐ YES ☐ NO **Transportation to/from Alaska**

What types were included?

☐ Air ☐ Motorcoach
☐ Cruise Ship ☐ Rental Car
☐ Alaska State Ferry ☐ Rental RV

☐ YES ☐ NO **Transportation within Alaska**

What types were included?

☐ Air ☐ Motorcoach
☐ Cruise Ship ☐ Rental Car
☐ Alaska State Ferry ☐ Rental RV
☐ Boat ☐ Self-Propelled
(bicycle, kayak)

☐ YES ☐ NO **Lodging** (Check types below)

- ☐ Hotel/Motel ☐ Alaska State Ferry
☐ Resort or Lodge ☐ RV/Car Campground
☐ Cruise Ship ☐ Bed & Breakfast
☐ Wilderness/Adventure

☐ YES ☐ NO **Specific sightseeing tours**

Please list them by name. _____

☐ YES ☐ NO **Transportation between**
 hotel and airport, cruise ship dock or ferry
 dock, etc.

☐ YES ☐ NO **Other items** included in
 trip package price. Please specify: _____

15. Which Alaskan cities, towns & places did you
 visit **while on your prepaid trip package?**

Cities/ Towns/ Places	Check here if daytime visit only.	If overnight: How many nights? (circle or specify)
1. _____	_____	1 2 3 4 5 6 _____
2. _____	_____	1 2 3 4 5 6 _____
3. _____	_____	1 2 3 4 5 6 _____
4. _____	_____	1 2 3 4 5 6 _____
5. _____	_____	1 2 3 4 5 6 _____
6. _____	_____	1 2 3 4 5 6 _____
7. _____	_____	1 2 3 4 5 6 _____
8. _____	_____	1 2 3 4 5 6 _____
9. _____	_____	1 2 3 4 5 6 _____
10. _____	_____	1 2 3 4 5 6 _____
11. _____	_____	1 2 3 4 5 6 _____

6

TRIP PACKAGES

Please list any trip packages you buy during your
 stay in Alaska – such as Flight Seeing, Boat Cruises,
 Fishing Charters, City Tours, Cultural Entertainment,
 Arctic Tours, Wilderness/Adventure trips. (List only

NAME OF TRIP PACKAGE	TOTAL AMOUNT PAID
1. _____	\$ _____
2. _____	\$ _____
3. _____	\$ _____
4. _____	\$ _____
5. _____	\$ _____
6. _____	\$ _____
7. _____	\$ _____
8. _____	\$ _____
9. _____	\$ _____
10. _____	\$ _____
11. _____	\$ _____
12. _____	\$ _____
13. _____	\$ _____
14. _____	\$ _____
15. _____	\$ _____

7

BOUGHT IN ALASKA

those trip packages which include transportation and which are not purchased "at the door".) Also list these trip packages in your Daily Diary.

[illegible]

DAILY EXPENSE
Use these category numbers in the
DIARY DAY on

Use these category numbers in the
DIARY DAY on

A. FOOD & BEVERAGE

1. In Restaurants, Snack Shops and Other Eating Places (excluding Salmon Bakes)
2. Bars and Lounges (where no meals were purchased)
3. Groceries & Beverages Bought in Grocery, Liquor & Other Stores

B. ENTERTAINMENT & RECREATION

1. **Overnight In-State Trip Packages**
(Arctic tours, Denali tours, overnight boat trips, fishing resort packages, wilderness/adventure trip packages)
2. **Day Trip Packages for sightseeing, attractions and salmon bakes** (flight seeing and sightseeing tours, fishing charters, boat tours, rafting trips, city tours, cultural entertainment, "Alaskan" shows, horseback riding, dog sledding, etc.)
3. **Other Entertainment, Sports and Recreation Spending** (recreational equipment rental and purchase, fishing equipment and supplies, outdoor supplies, tickets, lessons, movies, concerts, museum admission fees, skiing, licenses, etc.)

C. IN-STATE TRANSPORTATION

(excluding costs included in tours)

1. Ground Transportation (Taxi/Limo, City Buses, Train)
2. Rental car/rental RV
3. In-state Air Transportation

CATEGORIES

DIARY DAY Pages. See EXAMPLE the following page.

4. In-state Alaska State Ferry Transportation (include ferry berths under [H] LODGING instead of here)
5. Personal vehicle expenses and rental vehicle on-road expenses not covered in C.2. above (gasoline, oil, repairs, tires, parts, etc.)

D. CLOTHING

(excluding souvenir clothing)

E. ALL GIFTS, SOUVENIRS, ARTS & CRAFTS

1. Alaska Native Arts and Crafts
2. Other Alaska Arts and Crafts
3. Souvenir Clothing (t-shirts, hats, sweatshirts, etc.)
4. All other gifts, souvenirs, arts and crafts purchases

F. BUSINESS EXPENSES

(Secretarial, conference room/equipment rentals, printing, shipping, etc.) Include all business meals under [A] FOOD & BEVERAGE.

G. PERSONAL EXPENSES

(Telephone, stamps, beauty & barber shop, laundry, dry cleaning, repairs, sundries/ drugs, postcards, tips where not already included elsewhere, maps, photo supplies, newspapers, magazines, etc.)

H. LODGING

(Hotel / Resort / Bed & Breakfast / Hostel charges, campground fees, ferry berth charges or amount paid for other accommodations)

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EXAMPLE DIARY DAY

Please record each item purchased, its price, the city, town or place in which you purchased it and the letter and number of the expense category in which the item falls (from pages 9-10).

Date July 10

ITEM	PRICE	CITY/TOWN/ PLACE	EXPENSE CATEGORY
Breakfast	\$9.75	Fairbanks	A1
Snacks	\$3.50	"	A3
Canoe Rental	\$15.00	"	B3
Lunch	\$14.27	"	A1
Shopping - ulu knife	\$16.95	Denali Area	E1
Print of Mt. McKinley	\$50.00	"	E2
Film	\$5.27	"	G
City Tour	\$32.00	Anchorage	B2
Cocktails	\$10.25	"	A2
Salmon Bake	\$30.00	"	B2
Hotel	\$75.00	"	H

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DAY 1

Please record each item purchased, its price, the city, town or place in which you purchased it and the letter and number of the expense category in which the item falls (from pages 9-10). Refer to the Example Diary Day on page 11 if desired.

Date _____

ITEM	PRICE	CITY/TOWN/ PLACE	EXPENSE CATEGORY
------	-------	---------------------	---------------------



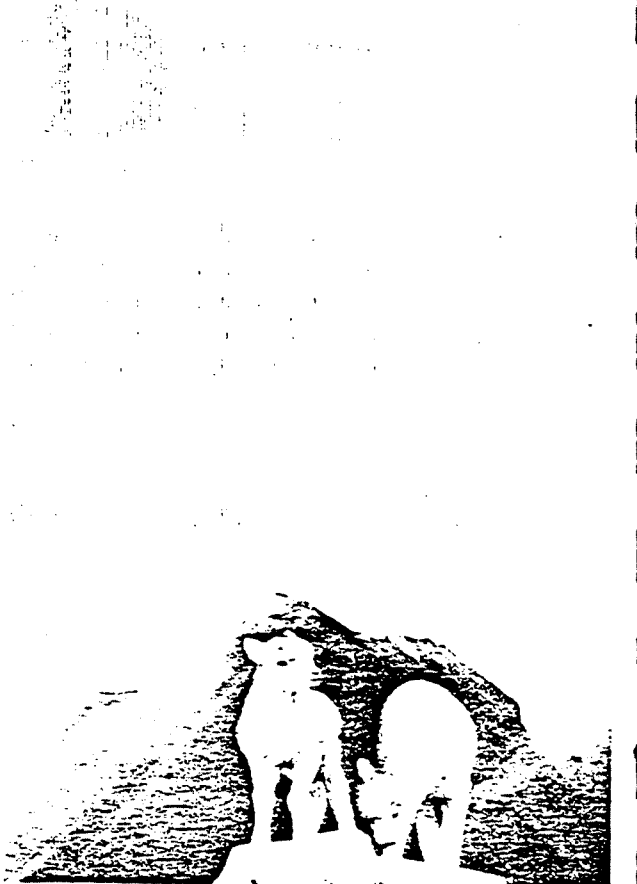
12

DAY 2

Please record each item purchased, its price, the city, town or place in which you purchased it and the letter and number of the expense category in which the item falls (from pages 9-10). Refer to the Example Diary Day on page 11 if desired.

Date _____

ITEM	PRICE	CITY/TOWN/ PLACE	EXPENSE CATEGORY
------	-------	---------------------	---------------------



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DAY 3

Please record each item purchased, its price, the city, town or place in which you purchased it and the letter and number of the expense category in which the item falls (from pages 9-10). Refer to the Example Diary Day on page 11 if desired.

Date _____

ITEM	PRICE	CITY/TOWN/ PLACE	EXPENSE CATEGORY
------	-------	---------------------	---------------------



14

DAY 4

Please record each item purchased, its price, the city, town or place in which you purchased it and the letter and number of the expense category in which the item falls (from pages 9-10). Refer to the Example Diary Day on page 11 if desired.

Date _____

ITEM	PRICE	CITY/TOWN/ PLACE	EXPENSE CATEGORY
------	-------	---------------------	---------------------



15

DAY 29

Please record each item purchased, its price, the city, town or place in which you purchased it and the letter and number of the expense category in which the item falls (from pages 9-10). Refer to the Example Diary Day on page 11 if desired.

Date _____

ITEM	PRICE	CITY/TOWN/ PLACE	EXPENSE CATEGORY
------	-------	---------------------	---------------------



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Before mailing your diary

Please check for completeness by answering these questions:

1. Did you fill out your date of departure from Alaska on the top of page 3? Please check to make sure.

2. As you left the State of Alaska, what type of transportation did you use?

- ☐ Air (to U.S. locations)
- ☐ Air (to foreign locations)
- ☐ Cruise Ship
- ☐ Motorcoach
- ☐ Personal Vehicle
- ☐ Alaska State Ferry
- ☐ Other _____
(please specify)

3. Have you forgotten to record any expense items in the diary?

- ☐ Yes ☐ No

If yes, please give us your best guess for the amount left out per day:

\$ _____ per day left out of diary

4. Did you spend more than 29 days in Alaska on this trip?

- ☐ Yes ☐ No

If yes, how many days over 29 did you stay?

_____ (Days over 29 in Alaska)

5. On average, how much were your per day expenses for those extra days?

\$ _____ per day.

Please lift flap on next page to continue

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MAIL IN DIARY AS SOON AS COMPLETED

Be sure to mail the completed Diary in its self-sealing cover. Remove the protective strip on the inside back cover, fold the flap over the full Diary and seal securely. Drop in a mailbox *just before leaving Alaska*, if possible.

If you cannot mail it while in Alaska, please mail it immediately from *wherever you may be*.

THANK YOU!

For helping make
Alaska a better place
to visit.



